

SmartAddresser

5

Mailing Software Redefined

Total Address Quality

Maximum Postal Discounts



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WELCOME TO *SMARTADDRESSER 5*!

SmartAddresser 5 is a powerful and comprehensive mail list management system for Windows. *SmartAddresser 5* is CASS™ and PAVE™ certified by the United States Postal Service (USPS).

Our mission is to provide our users with a premier bulk mailing software product and ultimate customer service. The *SmartAddresser 5* product offers a host of efficient list management features for data manipulation, including but not limited to, record validation, duplicate detection, find and replace, searching and merge/purge. The product prepares mail with speed and accuracy in a user-friendly interface. Our technical support is second to none in the industry and we urge you to contact us using one of our many methods described in this Getting Started Guide if you need help.

This Users Guide will provide you with complete instructions on all of the great *SmartAddresser 5* features.

WHAT'S NEW IN SMARTADDRESSER 5?

SmartAddresser 5 includes many new features, improvements, and refinements over version 3.0. Take a glance at the list below to get an idea of how much has gone into the latest revision of *SmartAddresser 5*! (Note: Not all features are completed)

New Features

1. New Presort Options (Additional Charges may apply)

- Bound Printed Matter
- Media Mail
- Library Mail
- Irregular Parcels
- Machinable Parcels
- Custom Market Mail
- Palletization of Containers, i.e., Sacks and Trays
- Palletization of Packages
- Multiple Drop Shipment for DDU, DSCF, DBMC and DADC (Periodicals)
- Periodical Mail low volume package support

All optional presorts supported (Additional Charges may apply):

- 5-Digit Schemes containers and packages
- 3-Digit Scheme containers and packages
- Metro Pallets
- Co-packaging of Flats
- Ride-Along support for Periodicals
- Priority Mail Presorting
- Express Mail Presorting
- MLOCR Letters
- MLOCR Flats
- MAIL.DAT support
- Auto DDU Chart Creation
- Consolidated Forms for Drop Shipments
- 8125 Drop Shipment Forms

2. Label Designer Builder

SmartAddresser 5 has created an intuitive and simple way to generate new label templates. With a simple point and click GUI and no typing, you can easily design new label templates to fit your specific needs.

3. Script

The script agent will contain a timer/calendar feature so that you can schedule jobs to automatically run on specific days and at specific times. The new script agent can watch specific folders (Folder Watch) and/or specific Files (File Watch) and begin processing automatically and immediately. This will give the user ultimate control and allow Managers to setup their workflow ahead of time. Managers can also setup websites that take random files submitted by clients and have the files processed from start to finish, including the generation of all documentation. The File Watch feature supports Wildcards using the Script Selector Table, so that files can be linked to Scripts. This way, when a file is copied into a specific folder the Script Agent can automatically begin processing the Script associated with the File name or File naming convention, e.g., *.txt or Cust01*.txt or Cust01??.txt, automatically, with no user interaction.

4. Detail Log

This feature will keep track of all windows that were opened, settings for each window for that database, all mouse movements and steps the user takes to process each list. The user can then go back to this log to trace his/her steps. This will be valuable for the Technical Support team so that a support engineer can easily reproduce the steps the user took reproduce the results. This feature in essence creates a Step-by-Step document of the user's actions when processing their data and can be printed so that another new user can use this documented information to perform the same steps. The value of this feature is immense and will save hundreds of hours of support and training. Support people can process a job from start to finish, then e-mail this step-by-step document to the user so that they can perform the same steps to complete their tasks.

GETTING STARTED

INTRODUCTION

SmartAddresser 5 is a powerful and comprehensive mail list management system for Windows 2000/NT/XP/Vista™. *SmartAddresser 5* is CASS (Coding Accuracy Support System) and PAVE (Presort Accuracy Verification and Evaluation) certified by the United States Postal Service (USPS™).

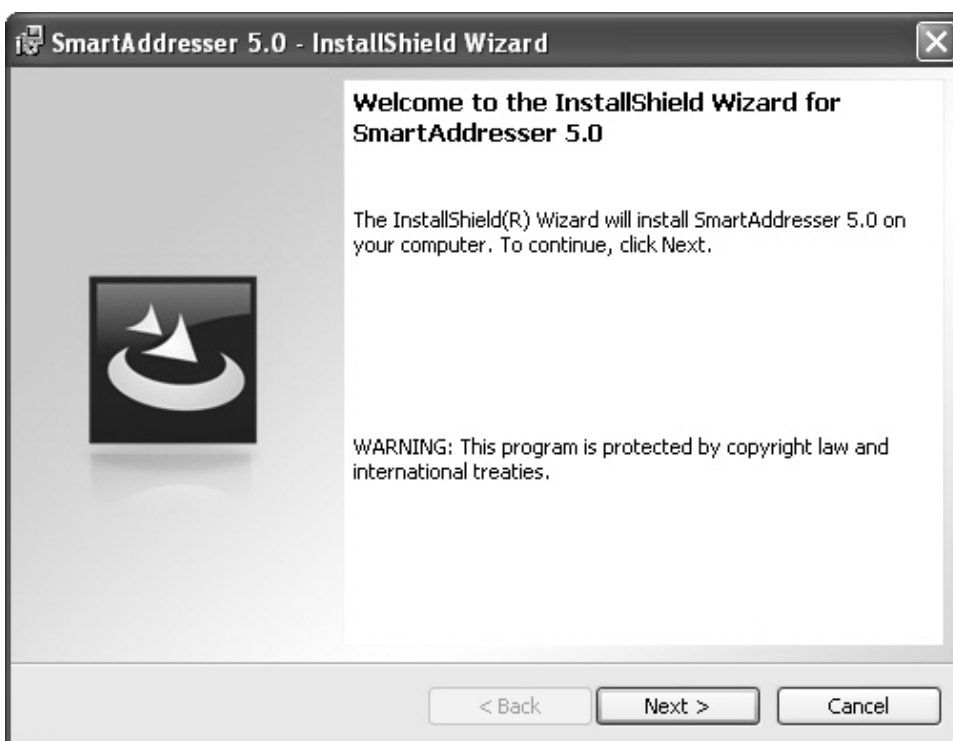
Our mission is to provide our users with a premier bulk mailing software product and ultimate customer service. The *SmartAddresser 5* product offers a host of efficient list management features for data manipulation, including but not limited to, record validation, duplicate detection, find and replace, searching and merge/purge. The product prepares mail with speed and accuracy in a user-friendly interface. Our technical support is second to none in the industry and we urge you to contact us using one of our many methods described in this users guide if you need help.

This Users Guide will provide you with complete instructions on all of the great *SmartAddresser 5* features, as well as tips, advice and information on mailing procedures.

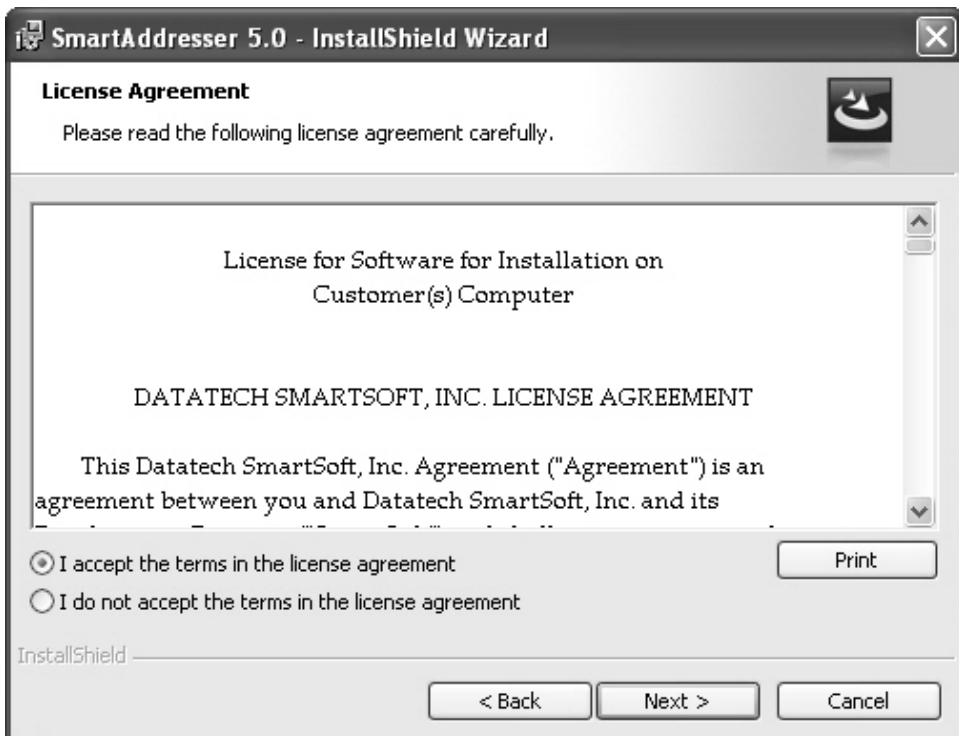
INSTALLATION INSTRUCTIONS

To install the SmartAddresser 5 program place your DVD in your DVD-ROM drive, and follow these instructions:

1. Go to **Start | Run**, and type D:\Setup.exe (where D:\ is the drive letter of your DVD-ROM drive).
2. The following screen will appear, click on **Next**:



3. The next screen in the License Agreement, please read this agreement then select "I accept the terms in the license agreement" and Click on **Next**.

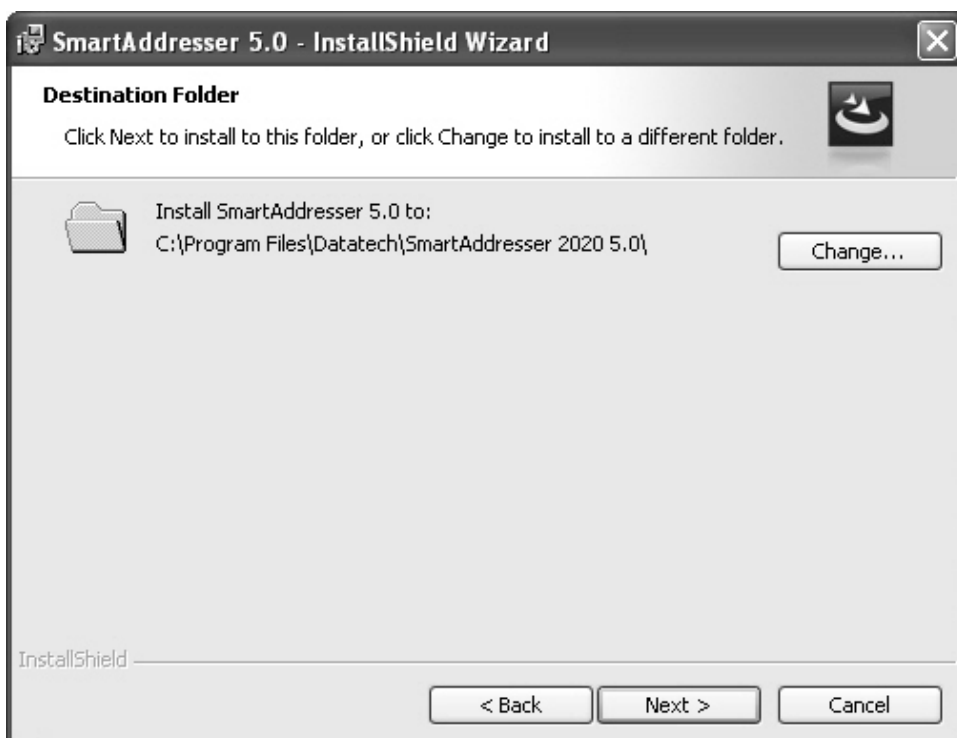


4. The next screen will ask for your Information. You will need to enter your customer number. This number will be on your Welcome Letter, it begins with a "99". After you enter this information click **Next**.

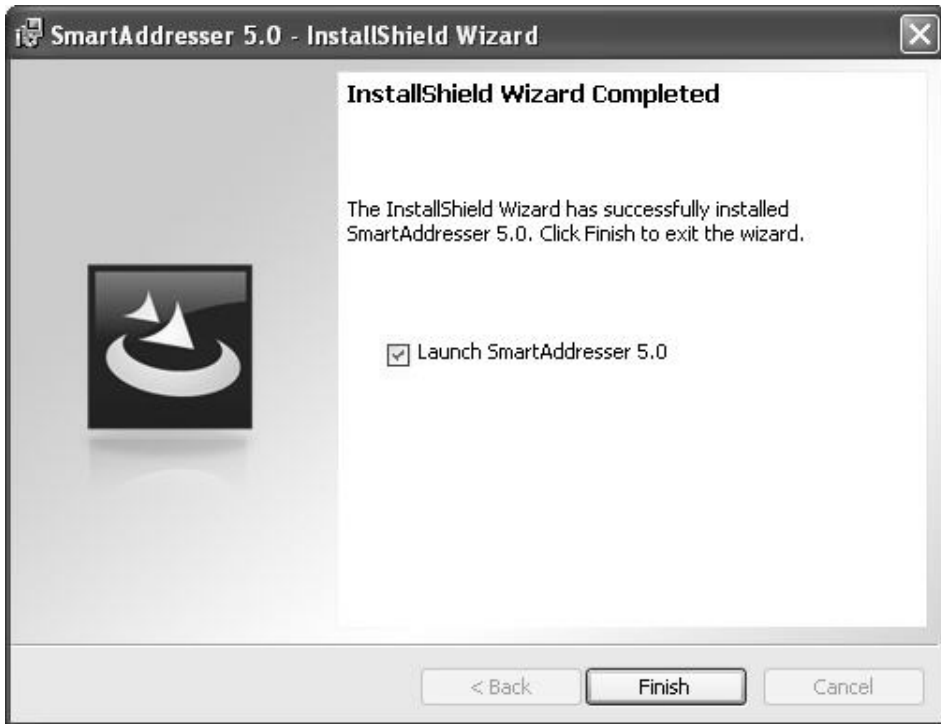


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5. The next two screens allow you to select the destination directories of the Program and the validation database. You should just select the default.



6. Click **Install** on the next screen and the software will begin the installation process.
7. This screen will let you know that the installation is complete.



Simply Click **Finish**, then continue to the next section to begin the tutorial.

Once you are finished installing and launch SmartAddresser 5 for the first time you will need to activate it. When you open SmartAddresser 5 for the first time the Activate Products window will appear, just click YES and your software will activate automatically. If you do not have Internet Access on the computer SmartAddresser 5 is installed or have any difficulty Activating, simply contact us and we will provide you a Registration Serial Number to activate your software.

INTRODUCTORY TUTORIAL

This tutorial will give you an excellent foundation for working with *SmartAddresser 5* by showing you how simple and easy *SmartAddresser 5* is to use for most mailing and database management functions. *SmartAddresser 5* has so many useful functions that it is impossible to absorb them all within this tutorial, however. Thus, we will be covering the core procedures within the software to prepare a demonstration list for mailing from start to finish. For more advanced features and data manipulation, refer to the appropriate topic within this help system. The procedures that are covered within this tutorial include:

- **Opening a Comma-Delimited Text File**

- **Optimizing the Database**
- **Validating Records (CASS Certifying records)**
- **Duplicate Detection**
- **Presorting the Mail (PAVE Certification)**
- **Printing the Barcoded Tray/Sack Tags, Reports, and Postal Service-required Mailing Statements.**
- **Printing the Mailing Pieces or Labels**

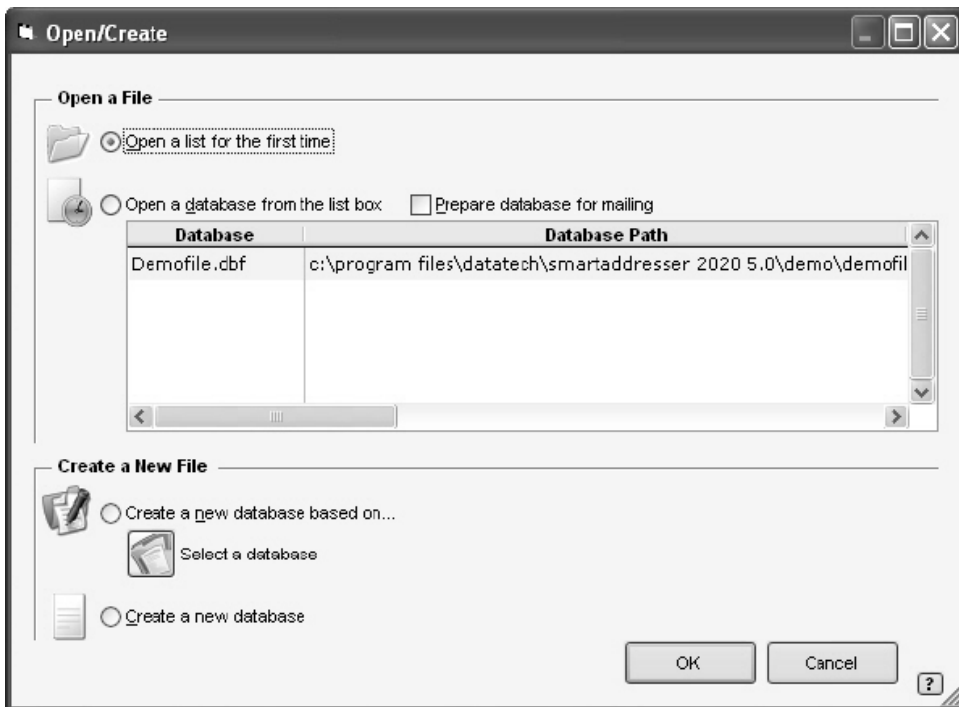
The first step is to open the *SmartAddresser 5* program. *SmartAddresser 5* launches the same way that most other Windows-based programs do on your computer; from the Windows Start button, select **Programs>Datatech SmartSoft> *SmartAddresser 5***. The program will open and you will be at the appropriate screen to begin this tutorial. You may want to print this page to refer to as you work with the software for the first time.

Opening a Delimited Text File

Delimited text simply means that a file (normally an ASCII text file) has the same character or characters that separate one field from another. The two most common Delimited Text files are Tab and Comma-Separated text, where either a tab or a comma separates the fields. Most programs available on the market today have the ability to create a file in one (or both) of these formats. The feature most associated with creating this type of file in programs is called Export or Save As. When a file of this type is created, the file name normally ends with .txt or .csv.

For your first procedure in *SmartAddresser 5*, you will learn what each of the different choices available to you in the Open/Create screen mean, and open our demonstration comma-delimited data file.

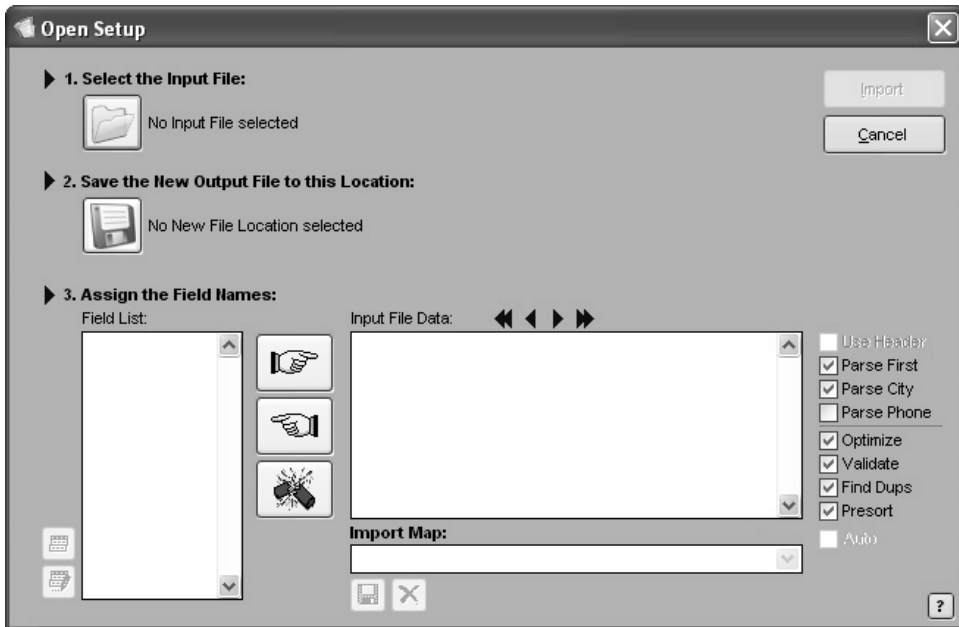
When you open *SmartAddresser 5*, the first screen you see is the Open/Create screen, shown below:



There are four basic options in this window, and each is described in detail under the open/create topic. For the purposes of this tutorial, we will be using the first option, open a list for the first time.

Follow each step below to import a list for the first time:

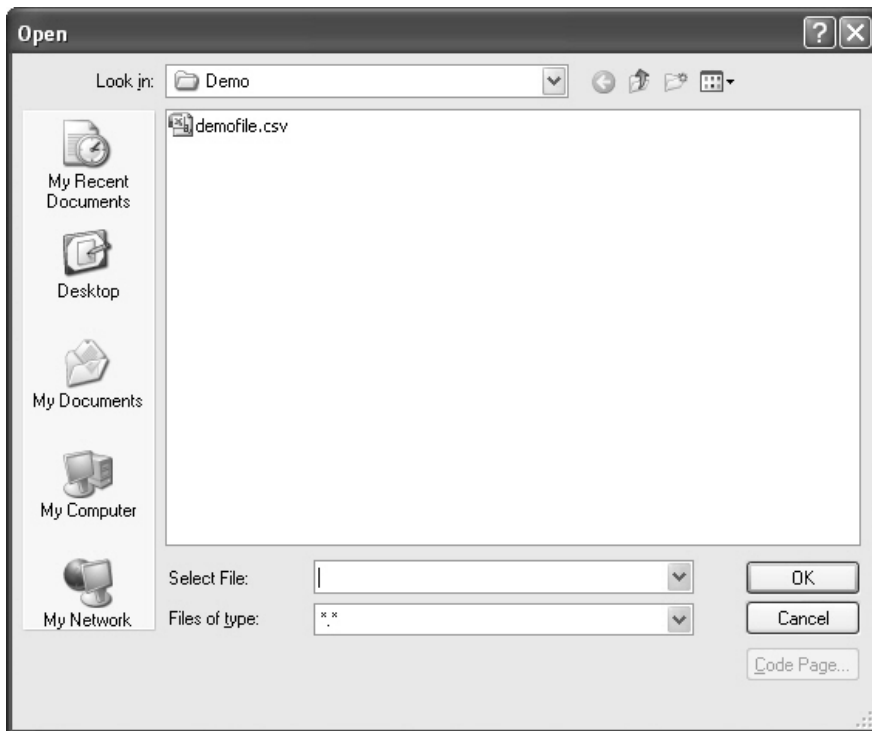
- In the open/create window, select the open a list for the first time radio button and click OK. The open setup window will appear:



TIP!

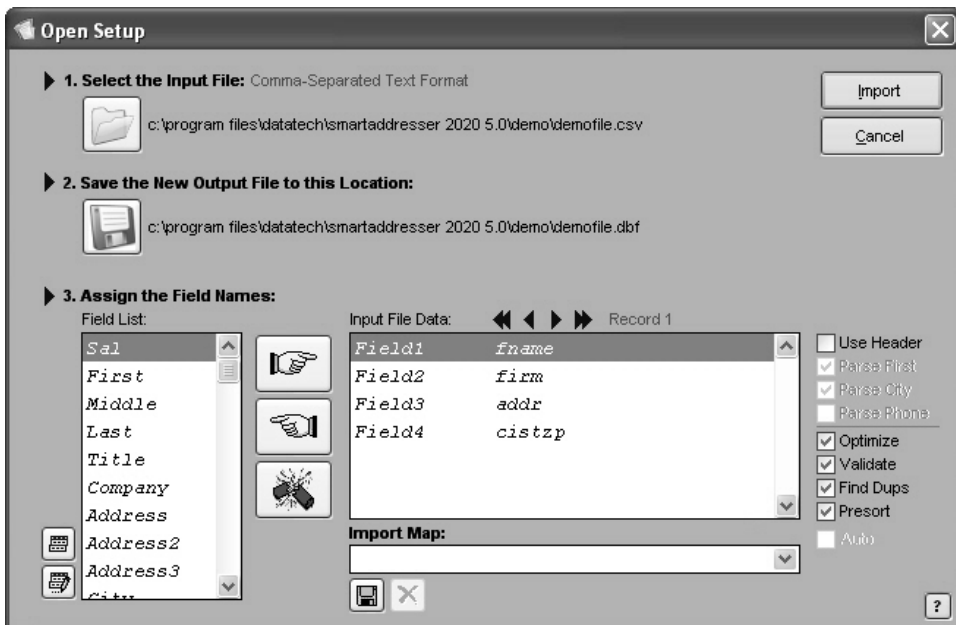
SmartAddresser 5 databases save to the same location as the input file by default. To change the default save behavior, modify the Save databases parameter in the folders tab of the properties screen (File>Properties). You can set the default path to be your "C:\Mailings" folder, or any path of your choosing using this method.

- Click on the button under select the input file. This is where you will select which data file you'll be importing into *SmartAddresser 5*. An open dialog box will appear:



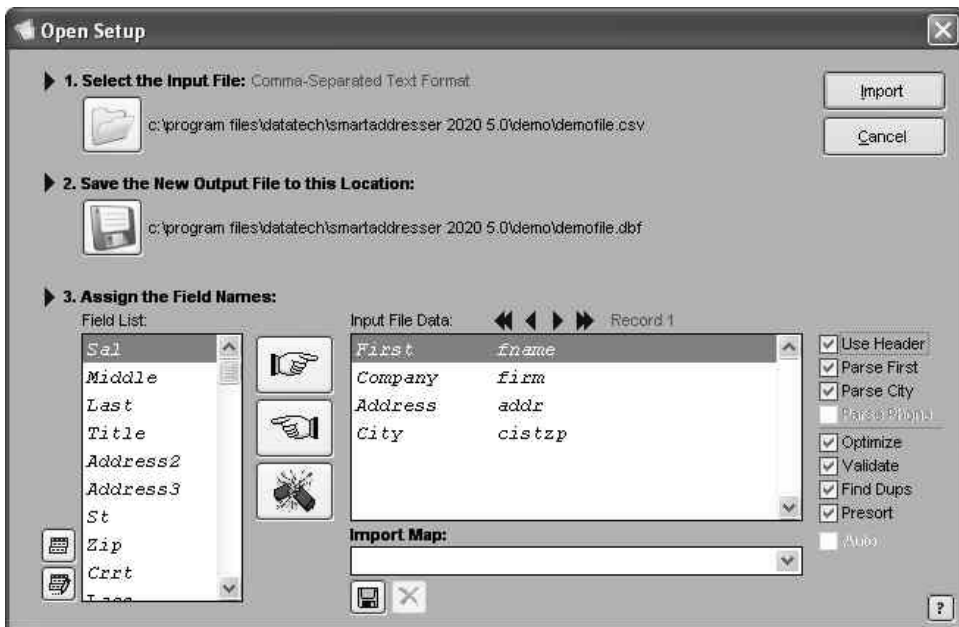
- Browse to the Demo folder (C:\Program Files\SmartAddresser 2020 5.0\Demo by default) and select the file named "demofile.csv". Click OK.

The file name and path will appear in the open setup screen, and the program will note that the file has been determined to be a comma-separated text file. You can save the new database to another location on your computer in step 2, save the new output file to this location. For the purposes of this tutorial, we'll leave the path set to default, which will create the new *SmartAddresser 5* database in the same folder as the input file. We're now ready for the next step in the importing process, field mapping.



Once the input file has been assigned, and the output file location has been specified, you must assign the *SmartAddresser 5* field names to your data. This is called mapping the fields. The field list (the default field names that *SmartAddresser 5* recognizes and uses) will be displayed on the left hand side of the open setup window, while the two columns in the input file data section display your input file's contents.

The file that we are opening contains a Header Record. In this case, manual field mapping is not necessary, because the field names appear in the first record in the file. This is called a Header Record. When you have a Header Record in your file that matches the Auto Field Maps table, you can simply check the Use Header check box and the field names in the first record are used, as shown below:



In the Open Setup window, you can select options to automatically proceed with specific functions of a mailing (the core options of optimizing, validating, finding duplicates, and presorting). For the purposes of this tutorial, we will perform these steps manually, however. Let's continue!

- Check the following boxes and review the explanation of each:
- Use Header - Check this box to use an existing Header Record (typically the first record in an Input File) as field names in the *SmartAddresser 5* Database. This refers to the Auto Field Maps table to determine recognized header record field names. Unrecognized names will not be used for default *SmartAddresser 5* functions.



TIP!

SmartAddresser 5 uses a table found in the Properties window (File>Properties>Fields) called the Auto Field Maps table to determine what fields are recognized by the software. If your header record contains a recognized field name, then the corresponding *SmartAddresser 5* field will be automatically assigned when checking the Use Header box. This is important! If your header record uses an unconventional name (mail_add1, for example), then *SmartAddresser 5* will not recognize the field, instead calling it "mail_add1" and ignoring it. Since *SmartAddresser 5* requires the address to be in the field called "address", and your field map did not include address, *SmartAddresser 5* creates the address field and uses it by default. The software then validates *this* address field, not your original mail_add1. This is when the Auto Field Maps window becomes very useful. For this example,

you'd select the address field, and enter a new association for that field (mail_add1).

*For more information, see the **Auto Field Maps** section of the help guide.*

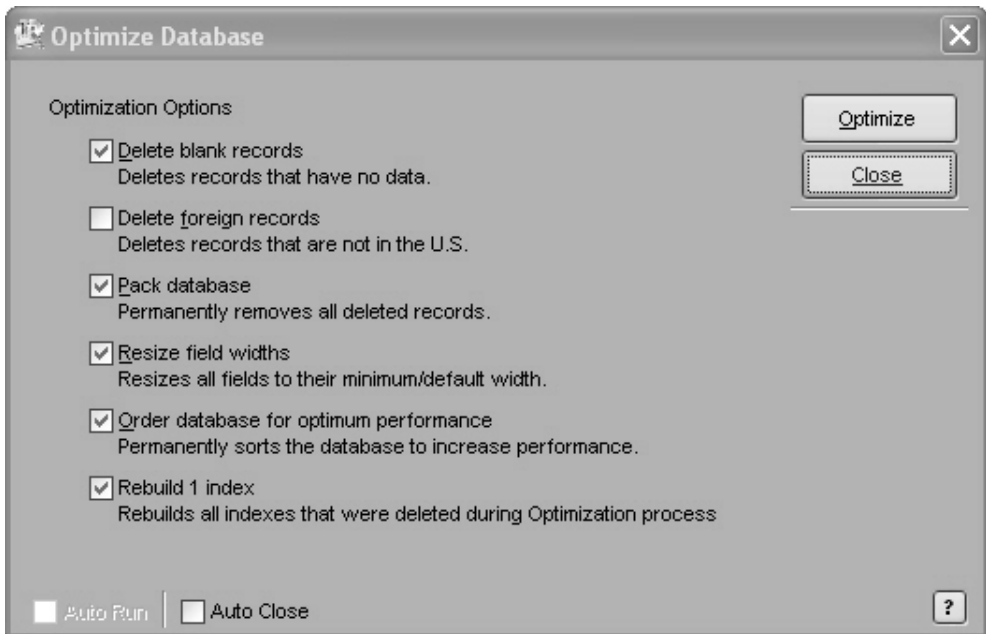
- Parse First - If the field named First is mapped to the full name data in the Input File Data, the Parse First check box will be enabled. When this box is checked, the full name data will be separated into the fields Sal, First, Middle, Last, and Title when the list is imported.
- Parse City - The Parse City checkbox will be enabled if the field name City is mapped to a single field that contains the City, State, and ZIP Code. If you check the Parse City check box, *SmartAddresser 5* will automatically create the fields ST and ZIP to accommodate this information when the field is parsed.

Leave all other check boxes unchecked, as this tutorial will walk you through performing the core functions within *SmartAddresser 5* manually.

- Click Import - The fields First and City will be parsed, and the import process will be complete. You will then see the List View in *SmartAddresser 5* displayed on screen.

Optimizing the Database:

From the List View, the first step you'll want to perform after Importing is to Optimize the Database. Performing an optimization greatly enhances the speed of processing within the *SmartAddresser 5* environment. To Optimize, first click Special>Optimize Database to bring up the Optimize Database window. With *SmartAddresser 5*, you can determine the extent of optimization with the check boxes shown:



- Leave the default boxes checked and click Optimize.

As soon as the Optimization process is complete, close the window (if Auto Close is not selected, in which case it will close on its own).

Validating Records

The next few steps will describe how to validate, or CASS certify, records. This process adds the +4 to your ZIP code, the Carrier Route, and Delivery Point Barcodes to all of your records that are determined to have a matching range within the USPS Database. Validating is required if you want to presort for automation rates. The Validate Records window offers many features to control the output and integrity of your data after CASS certification.

- From the Special menu, click Validate Records. The Validate Records window will appear:

Validate Records

Integrity:

- ☐ Don't Modify Input Address
- ☒ Preserve Original Company
- ☒ Preserve Original Address
- ☒ Preserve Original City
- ☒ Preserve Original State
- ☒ Preserve Original ZIP
- ☐ Exceptions List
- ☐ Delete Record If:
 - ☐ Missing Component
 - ☐ Address Blank
 - ☐ Foreign
 - ☐ Undeliverable
 - ☐ Multi Matched
 - ☐ Incomplete 5-Digit ZIP
 - ☐ Invalid 5-Digit ZIP

Personalize:

- ☐ Expand Components
 - ☐ Pre Direction
 - ☐ Suffix
 - ☐ Post Direction
 - ☐ Secondary Name
 - ☐ State
- ☐ Abbreviate Address 30 chars
- ☐ Abbreviate City
- ☐ Punctuate Components
 - ☐ Pre Direction
 - ☐ Suffix
 - ☐ Post Direction
 - ☐ Secondary Name
 - ☐ State
- ☐ Standardize Company Name
- ☐ Use Preferred City Name

Output:

- ☒ Line of Travel Information
- ☐ Parsed Address Fields
- ☐ County Code (FIPS)
- ☐ County Name
- ☐ Congressional District
- ☒ LACSLink
- ☐ 5-Digit ZIP Code
- ☐ +4 Code
- ☐ Delivery Point and Check Digit
- ☐ Delivery Point
- ☐ Check Digit
- ☐ Area Code
- ☐ Longitude/Latitude
- ☐ Time Zone
- ☐ Finance Number
- ☐ Address Type
- ☒ Delivery Point Validation (DPV)
- ☒ Clear Existing +4 if not coded
- ☒ Clear Barcode Field if not coded
- ☒ Clear Existing CRRT if not coded
- ☒ Record Status
- ☒ Error and Warning Codes

Format:

- ☒ Upper
- ☐ Mixed

Dictionary:

- ☐ Enable

Saved Settings:

[Dropdown Menu]

[Icons: Save, Load, Cancel]

Misc:

- ☒ Show Stats
- ☒ Auto Close
- ☐ Auto Run

Validate:

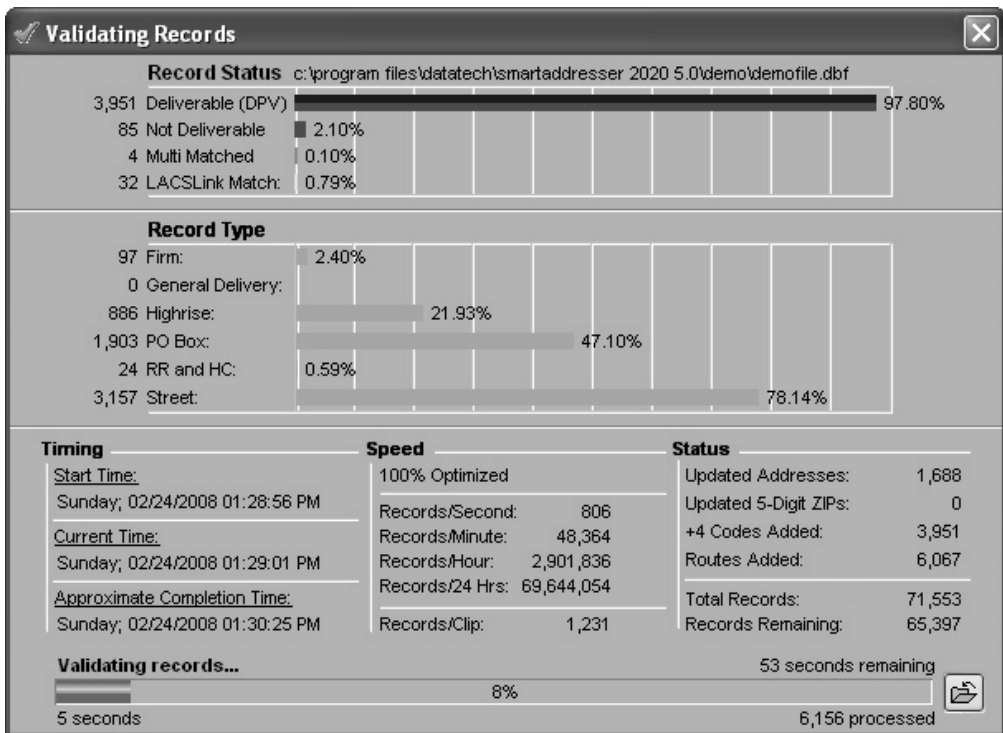
- ☒ All Records
- ☐ Selection
- ☐ Use Z4Change

Buttons: Validate, Close

Footer: NCOALink+ DATATECH SMARTSOFT

Check the boxes as shown in the above diagram (the bottom five selections in the output column are selected by default; Line of Travel is a useful feature that you'll want to keep selected for most standard validations as well. It's required for most carrier route rates, and it doesn't slow down the validation process at all. For a more thorough description of the options in the Validate Records window, refer to the **Customizing Your Validation Settings** section of the help guide.

- Click on the Validate button, and the Validating Records Results window will appear. This window shows a detailed breakdown of the deliverable/non-deliverable records, as well as statistics for the time it took to process the list, the speed of processing, and specific pieces of data added to the records:



As soon as the validation process is completed, this window will close and you'll be returned to the List View. We will next perform a basic duplicate detection on the demofile.

- From the Select menu, choose Show Duplicates. The Show Duplicates window will appear:

Show Duplicates

Basic User Defined

Mail one piece of mail to each:

☒ Person ☐ Address ☐ Household

☐ Use Soundex ☐ Exact Match Address match threshold: 80 %

☒ Review Duplicates ☐ Backup Duplicates ☒ All Records ☐ Auto Run

Start Cancel

Priority Record

☒ Original ☐ Newest ☐ Most Information ☐ Least Information ☐ User Defined

☐ Order by: First

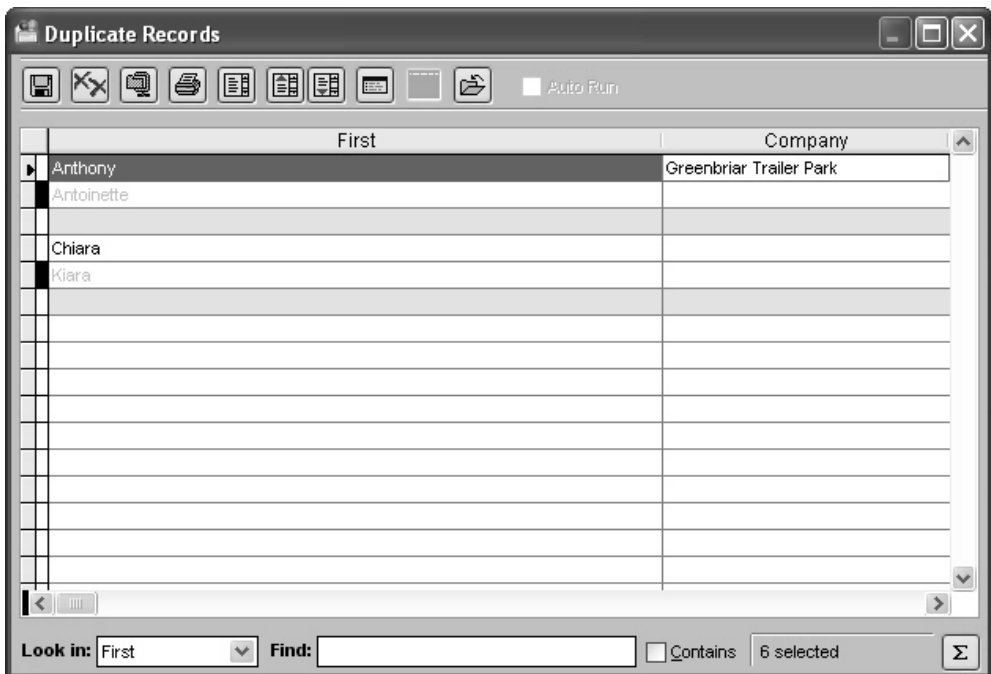
☐ Descending

☒ Enable ?

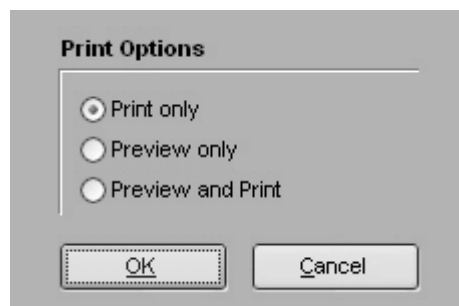
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The *SmartAddresser 5* Show Duplicates window offers two methods of duplicate detection, shown by the tabs at the top of the screen: Basic and User Defined. The Basic duplicate detection process finds duplicates by matching specific predefined fields in the database. The User Defined duplicate detection method allows you to control the fields (or portions of a field) that you wish to match on. For the purposes of this tutorial, we will be using the Basic method of detection.

- Click on the Basic tab if it's not already selected.
- Select "Person" as your chosen match code.
- Set the Priority Record to "Original". This tells *SmartAddresser 5* which record you want to keep when finding duplicates. Original flags the record closest to the top of the list as the priority record, while Newest would keep the record closest to the bottom.
- Enable the A.K.A. Dictionary in the lower right-hand corner of the window. The A.K.A. Dictionary includes common match code references that aid in duplicate detection. For example, Bob would be flagged as a match for Robert; Mike for Michael, etc. For more information on the A.K.A. Dictionary, see the **A.K.A. Dictionary** section of the help guide.
- Select the "Use Soundex" option. This uses a unique algorithm to compare names that sound similar. For example, Carrie and Kari.
- Leave the address match threshold at 80%. This adjusts the percentage of characters in the Address field that the program will use to detect duplicates by searching the field from left to right. *This percentage is of the entire field, not just the data within it!*
- Ensure that "Review Duplicates" is selected. This will present you with a window showing all matches after running the detection, allowing you to manually make changes if desired.
- Click Start. The duplicate detection engine will then query the data and present you with the Review Duplicates window:



- Click the Print button  to print the Duplicate Records Report. The Print Options Dialog box will appear:



- Select the option you would like to use to generate the Duplicate Records Report. *SmartAddresser 5* will return to the Review Duplicates window when finished printing the report.
- Once returned to the Review Duplicates window, click the Update Database button . This updates the main database with the detected duplicates. When you click this button, a dialog box will display the count of duplicates that have been flagged for deletion. Click the OK button, and you will be returned to the main database. Duplicates flagged for deletion are only

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temporarily deleted (shown as a grayed out record in the List View), but can be permanently removed by selecting Edit>Pack Database.



TIP!

The basic duplicate detection options all share a few fields in common: address, city, st, and zip. Every basic detection option queries those fields. The differences in the three types of basic duplicate detection are as follows:

Person - Queries the First and Last fields as well as Address, City, St, and ZIP

Address - Queries the Company field as well as Address, City, St, and ZIP

Household - Queries the Last field as well as Address, City, St, and ZIP

Congratulations! You're now ready to presort the mail!

Presorting the Mail

The next few steps will describe how to Presort the Mail. Presorting groups all records together by ZIP code, distributes the ZIP code groups to carrier route, 5-digit, 3-digit, scheme, ADC/AADC, and MADC/MAAD trays and sacks, depending on the quantities per 5-digit ZIP code and the class of mail you are sorting for. Presorting also produces the proper destination tags so that your mail goes to the correct post office facilities, which can then process the mail for the particular ZIP codes more efficiently.

When a list is presorted properly, the post office rewards you with lower postage rates. The finer mail is sorted, the lower your rate. The most efficient way to prepare your mail is for automation discounts. Information on making your mail piece automation compatible can be found at your local post office, or online at <http://pe.usps.gov>. *SmartAddresser 5* is PAVE (Presort Accuracy Validation Evaluation) Certified for all types of presorts.

- From the Sort menu, choose Presort Mail. The Presort Setup screen will appear:

Presort Setup

Piece Setup:

Class: Standard Mail

Status: Profit

Size: Letter

Weight: Pounds 0.04810

Type: Machinable ☐ Print Barcodes

Pay Type: Imprint ☐ Surcharge

Container Setup:

Type: MM Trays

Minimum: 265 12.7465 lbs.

Maximum: 311 14.9591 lbs.

☐ Pallets

Minimum: 1000

Maximum: 4000

☒ Include Non ZIP+4 Records

☒ Include Carrier Route Level ☐ Detached Address Labels

☐ News ☐ In-country

☐ Create Firm Packages

☐ Contains Advertising ☐ Ride-Along

☐ % Pounds 0.00000

☐ Auto Close ☐ Auto Print

Mail Drop Setup:

ZIP+4: 53714

☒ Madison Carrier Annex VM 53714-2408

☒ SCF Madison VM 53714-9998

☐ BMC Chicago IL 60130-2296

Database and Presort Information:

Demofile.dbt

Save Presort Folder to:

...

Presort Folder name:

Presort Folder

Saved Settings:

...

☐ Prepare in Reverse order

Presort Close

For the purposes of this tutorial, we will be preparing a Standard Class, Letter-sized piece for mailing. Follow the steps below to setup the presort properly:

- From the Class pull-down, select "Standard Mail".

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- From the Status pull-down, select "Profit".
- From the Size pull-down, select "Letter".
- From the weight pull-down, choose "Ounces", and type ".03" (without the quotation marks) into the text box.
- From the Type pull-down, choose "Machinable". Enable the "Print Barcodes" option.
- From the Pay Type pull-down, choose "Imprint".



TIP!

Not sure what your mail piece's size should be? That's ok! Use the size calculator button to open the Mailpiece Size Calculator window! You can then enter the height, length, and thickness of the piece, and *SmartAddresser 5* will determine the proper size choice to select for you! You can use the other calculator buttons in the presort setup screen to determine the weight of a single piece and the minimum and maximum pieces per tray as well. If you're not sure what the required data of your particular sort is, click on the appropriate calculator button and let *SmartAddresser 5* determine the correct settings for you!

You've now determined your basic piece and sortation settings, and you're ready to set the minimum and maximum pieces per container. This is an extremely important step, as United States Postal Service regulations have specific guidelines for what constitutes a "full" tray or sack. You'll want to follow the next few steps to ensure that the containers won't fail inspection at the post office:

- Click the Size Calculator  next to the Container Minimum in the Container Setup portion of the Presort Setup window. This will bring you to the MM Tray Calculator window:

MM Tray Calculator

If you have mailpiece(s) stacked, and you measure the total thickness to be: inches, then you can expect a "full" two foot tray (21" long) to carry between 264 and 311 pieces.

OK Cancel

The simplest way to explain the calculations is to grab a stack of your mailing pieces that measures approximately one inch high. Count the number of pieces in that stack, and then enter the data in the text boxes. In this particular example, we'll say that you count forty pieces in the one-inch stack.

- Enter 40 in the mail pieces text box, and 1 in the inches box as shown:

MM Tray Calculator

If you have mailpiece(s) stacked, and you measure the total thickness to be: inch, then you can expect a "full" two foot tray (21" long) to carry between 714 and 840 pieces.

OK Cancel

After doing so, *SmartAddresser 5* has determined that you can expect a full tray to carry between 714 (minimum) and 840 (maximum) pieces. Note that the minimum number of pieces for trays will always be 85% of the maximum value.

SmartAddresser 5

- Click OK, and you will be returned to the Print Presort Screen, which should look like the following:

Presort Setup

Piece Setup:

Class: Standard Mail
Status: Profit
Size: Letter
Weight: Pounds 0.04810
Type: Machinable ☐ Print Barcodes
Pay Type: Imprint ☐ Surcharge

Container Setup:

Type: MM Trays
Minimum: 714 34.3434 lbs.
Maximum: 840 40.4040 lbs.
☐ Pallets
Minimum: 1000
Maximum: 4000

☒ Include Non ZIP+4 Records
☒ Include Carrier Route Level ☐ Detached Address Labels

☐ News ☐ In-county
☐ Create Firm Packages
☐ Contains Advertising ☐ Ride-Along
% Pounds 0.00000

Mail Drop Setup:

ZIP+4:
☒ Goleta CA 93111-9998
☐ SCF Santa Barbara CA 93199-9997
☐ Los Angeles Bulk Mail Center CA 90201-9997

Database and Presort Information:

Demofile.dbf

Save Presort Folder to:

...

Presort Folder name:

Presort Folder

Saved Settings:

...

☐ Auto Close ☐ Auto Print

Presort Close

☐ Prepare in Reverse order

- Ensure that the Include Non ZIP+4 Records and Include Carrier Route Sort Level checkboxes are enabled.

The next step is to input the data for your Mail Drop Setup. The ZIP+4 is the location where your permit is held. For the purposes of this tutorial, we'll use Culver City, CA.

- In the ZIP+4 text box under Mail Drop Setup, input "93111" and hit Tab on your keyboard. This will set your local post office to Goleta CA 93111-9998.

Presort Setup

Piece Setup:

Class: Standard Mail
 Status: Profit
 Size: Letter
 Weight: Pounds 0.04810
 Type: Machinable ☐ Print Barcodes
 Pay Type: Imprint ☐ Surcharge

Container Setup:

Type: MM Trays
 Minimum: 714 34,343 lbs.
 Maximum: 840 40,404 lbs.
☐ Pallets
 Minimum: 1000
 Maximum: 4000

☒ Include Non ZIP+4 Records
☒ Include Carrier Route Level ☐ Detached Address Labels

☐ News ☐ In-county
☐ Create Firm Packages
☐ Contains Advertising ☐ Ride-Along
 % Pounds 0.00000

☐ Auto Close ☐ Auto Run

Mail Drop Setup:

ZIP+4: 93111
☒ Goleta CA 93111-9998
☐ SCF Santa Barbara CA 93199-9997
☐ Los Angeles Bulk Mail Center CA 90201-9997

Database and Presort Information:

Demofile.dbf

Save Presort Folder to:

...

Presort Folder name:

Presort Folder

Saved Settings:

☐ Prepare in Reverse order

- Under the Saved Settings pull down, Click the Create New Settings button , then type "Demofile" into the Saved Settings box. Lastly, click the Save Current Settings button . This allows you to recall any saved presort settings at any time from the drop-down menu.

When completed, your presort set screen should like the following:

Presort Setup

Piece Setup:

Class: Standard Mail

Status: Profit

Size: Letter

Weight: Pounds 0.04810

Type: Machinable ☐ Print Barcodes

Pay Type: Imprint ☐ Surcharge

Container Setup:

Type: MM Trays

Minimum: 714 34,343 lbs.

Maximum: 840 40,404 lbs.

☐ Pallets

Minimum: 1000

Maximum: 4000

☒ Include Non ZIP+4 Records

☒ Include Carrier Route Level ☐ Detached Address Labels

☐ News ☐ In-county

☐ Create Firm Packages

☐ Contains Advertising ☐ Hide-Along

☐ % ☐ Pounds 0.00000

☐ Auto Close ☐ Auto Run

Mail Drop Setup:

ZIP+4: 93111

☒ Goleta CA 93111-9998

☐ SCF Santa Barbara CA 93199-9997

☐ Los Angeles Bulk Mail Center CA 90201-9997

Database and Presort Information:

Demofile.dbf

Save Presort Folder to:

...

Presort Folder name:

Presort Folder

Saved Settings:

Demofile

☐ Prepare in Reverse order

- Click Presort, and you'll be taken to the Print Presort window:

Print Presort

Database: 1. Demofile

Presort Path: c:\program files\datatech\smartaddresser 2020 ...\presort folder\

Postage: \$761.97

Containers: 7 Containers

At this point, you're ready to begin printing the applicable documentation and labels!

- The first thing you'll typically do after presorting is to print the postal paperwork and ensure that the sortation and numbers match up. To do so, click on the Print Reports button. You'll be taken to the Report Settings window:

Reports

Required Reports

- ☒ Qualification Report
- ☐ Mailing Statement
- ☒ [Dropdown]
- ☒ CASS Certificate
- ☐ PS Form 3825
- ☒ Packaging Report
- ☐ Pallet Card
- ☒ Presort Parameter Report
- ☒ Include Presort Window

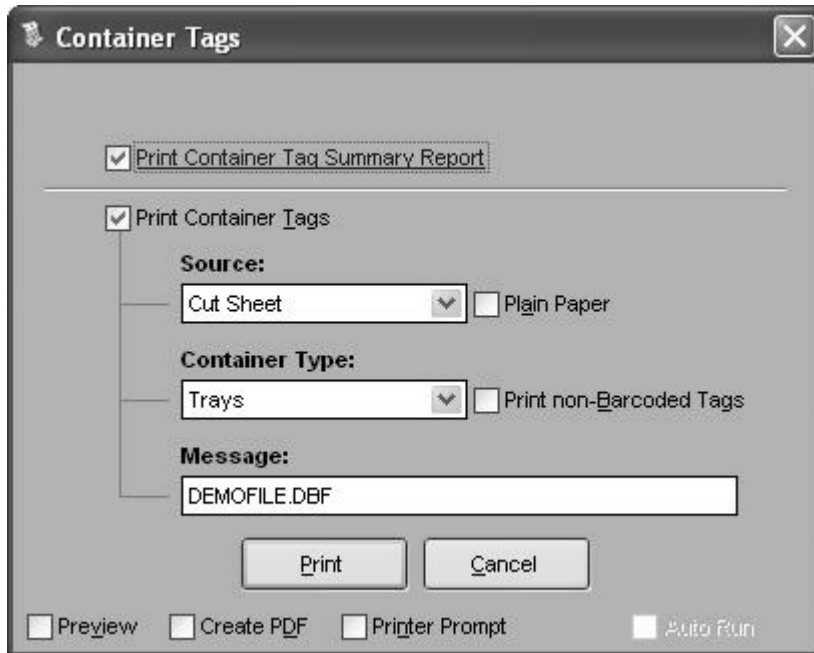
Mail Date: 02/24/2008 Weight: Pounds 0.04810

☐ Preview ☐ Create PDF ☐ Printer Prompt ☐ Auto Run

- Check all the report options, and then check the preview box. This will then bring up the previews of each report, in order.

Next up will be the tags for the containers that you'll be placing your mail into.

- Click the Cancel button on the Reports window, which will return you to the print settings screen. Click on Tags. The next window to appear will be the Tags window:



When printing tags, you will be allowed to print a tag summary report (not required by the Post Office, but helpful in determining where your mail is sorting to with a quick summary report) as well as print the tags themselves. For the purposes of this tutorial, you'll be printing tray tags for standard mail automation letters.

- Select Cut Sheet from the source, and Trays as the container type. Check the preview box and then hit print. You'll then be presented with previews of the Tag Summary Report, as well as the tags themselves.

The final step in the preparation of any mailing is in the printing of the mailing pieces themselves. There are far too many options to cover in the tutorial with regards to individual label or envelope sizes, content, or design, so most of the instructions have been divided up into multiple sections on **editing labels**. For this tutorial, we'll just preview a sheet of Avery 4145 labels on a standard Laser printer.

- Cancel the Container Tags window, and click the Labels button on the Print Presort window. The print settings window will appear:



- In the Printer pull-down menu, select LaserJet. This determines the barcode type that *SmartAddresser 5* will be sending to your printer. For a standard LaserJet, *SmartAddresser 5* sends a standard True Type font image for the barcode.
- In the Template pull-down menu, select 4145.lbx. This is a standard one-column Avery label equivalent.
- Check the Preview and Print Barcode checkboxes, and click Print. You will then be presented with the final preview of the tutorial: the labels themselves.

After performing the functions found throughout this tutorial, you'll have a firm grasp of the fundamental operations within *SmartAddresser 5*. The core features (importing, optimizing, validating, detecting duplicates, and presorting) are just a fraction of what *SmartAddresser 5* is capable of, but are more than likely the operations you'll return to time and again with each successive mailing.

For more detailed instruction on other operations within *SmartAddresser 5*, refer to the applicable section of the help guide.

SMARTADDRESSER 5 SYSTEM REQUIREMENTS

- PC with Pentium class processor (Pentium 3 Class or higher recommended)
 - Microsoft Windows 98/ME/NT 4.0/2000/XP/Vista operating system with current available service packs installed
 - 512MB of RAM (2 Gigs recommended)
 - 2 gigs of available hard disk space
 - DVD Drive
 - Super VGA or higher resolution monitor
 - Microsoft Mouse or compatible pointing device
 - Microsoft .NET framework 1.1 or later installed
 - Internet Access recommended (Required for some Add ons)
-

LEARNING THE BASICS

SMARTADDRESSER 5 TOOLBAR AND BUTTON DESCRIPTIONS

Buttons

There are many buttons in the *SmartAddresser 5* toolbar. Each function that a button performs can also be accomplished by selecting the corresponding menu option. For more detailed information on each button's function, see the corresponding topic. Each button in the main toolbar and its function is described briefly below.

Button Functions



Displays the Create New Database window.



Displays an Open dialog box to allow you to open a DBF.



Displays the Font dialog box to allow you to change the font in List View.



Displays the Backup window.



Deletes the record that is currently selected. If the current record is already deleted, the record will be recalled.



Permanently removes all records that are tagged for deletion from the database.



Marks the record that is currently selected. If the current record is already marked, the mark will be cleared.



Displays the Print dialog box.

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Displays the Search Editor window to allow you to create a custom Search Filter.



Displays the Command window.



Displays the Import Setup window.



Displays the Export Setup window.



Displays the Optimize Database window.



Displays the Validate Records window.



Displays the Show Duplicates window.



Displays the Presort Setup window.



Displays the Print Presort window.



Launches Outlook Express to send e-mail to us.



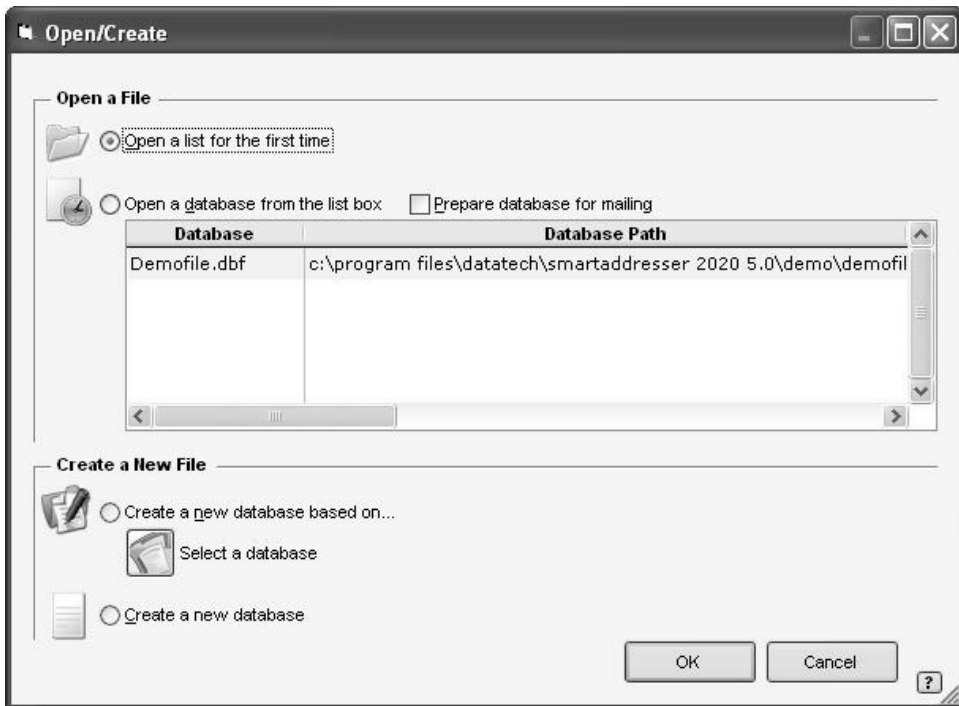
Saves the current database.

USING THE OPEN/CREATE WINDOW

When you launch *SmartAddresser 5*, the Open/Create window appears. In this window, you will determine the first step that you will take with your data. You can open a list for the first time, open an existing *SmartAddresser 5* database, create a new blank database based on the structure of an existing *SmartAddresser 5* database or create a new blank *SmartAddresser 5* database with our predetermined typical fields.

Follow the steps below to use the Open/Create window.

- Launch the *SmartAddresser 5* program. The Open/Create window will appear:



- Select the desired radio button as described below:

Open a list for the first time - Displays the Open Setup window that will guide you through converting a file. For instructions on converting files see *Opening a List*.

Open a database from the list box - Displays a list of all files that have been previously opened in *SmartAddresser 5* so that you can select a file from the list that you would like to open.

Prepare database for mailing - Check this box and the program will automatically guide you through the basic steps for preparing a mailing, which are, Optimize, Validate, Duplicate Detect and Presort.

Creates a new database based on existing database - Creates a new database based on the structure of an existing *SmartAddresser 5* database. See Creating a New Blank Database for more information.

Create a new database - Creates a blank *SmartAddresser 5* database with predetermined typical fields. See Creating a New Blank Database for more information.

- Click OK.

CONSISTENT WINDOW FORMATS

Many of the *SmartAddresser 5* features include the same radio buttons and check boxes to allow for ease of use and precise data manipulation. The Mark window shown below, for instance, shows the scope radio buttons and the check boxes that are consistent throughout the program. In this topic, each of the radio buttons and check boxes will be explained in detail.

The screenshot shows the 'Mark' window with the following elements:

- Radio Buttons:** Record, From-To, Next, Rest, Marked, Deleted, Selection (selected), All.
- Input Fields:** 1 (for Record), 1-3111 (for From-To), 1 (for Next), 1 (for Rest), Start at: 1.
- Buttons:** Mark, Close.
- Checkboxes:** Include Deleted, Clear Marked.
- Bottom Left:** Auto Run, Auto Close.
- Bottom Right:** Help icon (?)

The following are radio button selections on the consistent format windows, with descriptions for each*:

- **Record** - Processes a specific record number. It will default to the current record number. However, you can type in any record number for processing.

- **From-To** - Processes a range of records based on the record numbers you type in. By default, it will be from the current record to the end of your list.
- **Next** - Processes the next Nth number of records starting at the number designated by you. By default, it will start at the current record and process the next 1.
- **Rest** - Processes the rest of the list starting at the record number designated by you. By default, it will start at the current record.
- **Marked** - Processes only the marked records in your list. For information on marked records, see Marking Records.
- **Deleted** - Processes only the deleted records in your list. For more information on deleted records, see Deleting Records.
- **Selection** - Processes only the selection of records showing on your screen.
- **All** - Process the entire list.

The following are check boxes on the consistent format windows, with descriptions for each:

- **Include Deleted** - Includes the deleted records in the process.
- **Auto Close** - Automatically closes the window when the process is completed.
- **Auto Run** - Available only when running a script. See Scripting for more information.

**The Clear Marked option is not on all consistent window formats, as it is only listed on the Mark Window.*

KEYBOARD SHORTCUTS WITHIN SMARTADDRESSER 5

There are many functions in *SmartAddresser* 5 that can be accomplished by using keyboard shortcuts. Below is a list of keyboard shortcuts and their functions.

Shortcut Function:

Ctrl+O - Open database

Ctrl+W - Close active database

Ctrl+Q - Quits the *SmartAddresser* 5 program

Ctrl+X - Cut highlighted data

Ctrl+C - Copy highlighted data

Ctrl+V - Paste copied/cut data

Ctrl+M - Open the Mark window

Ctrl+N - Add a New Record

Ctrl+A - Show All Records

Ctrl+H - Open the Search Editor window

Ctrl+G - Go to Record

Ctrl+Z - Undo last action

Alt+D - Show Deliverable records

Alt+M - Show Marked records

Alt+B - Show Background records

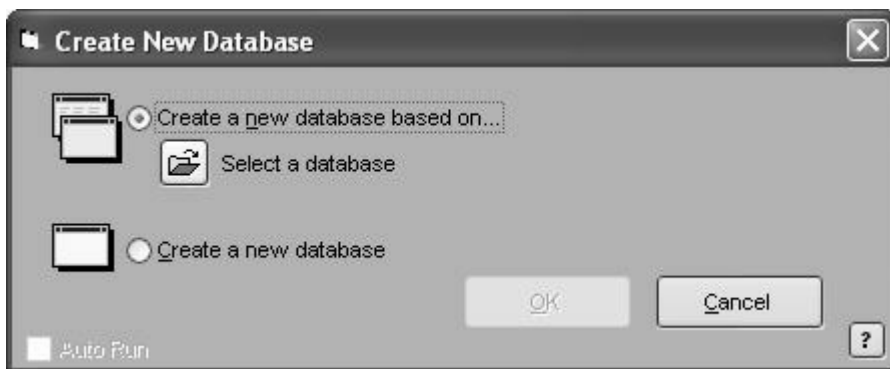
IMPORTING, EXPORTING AND CONVERTING FILES

CREATING A NEW DATABASE

Most users will have existing files that they will want to import into *SmartAddresser* 5. However, some users may need to create a blank database and manually input the data, and others may want to use the Import feature to import data into a blank database that has the same structure as previous files that they have worked on. Either way, the New feature will handle the task.

Follow the steps below to create a New blank database:

- From the File menu, choose New. The Create New Database window will appear:



- Select the desired radio button as described below:

Create a new database based on...

* Creates a new database based on the structure of an existing database. The new database will include the exact same field names, width, type and order as the database that you select. When you select this radio button, click the Open button to choose the database that contains the desired format.

Create a new database

* Creates a blank *SmartAddresser* 5 database with the fields determined in the Properties window. See Fields Properties for more information.

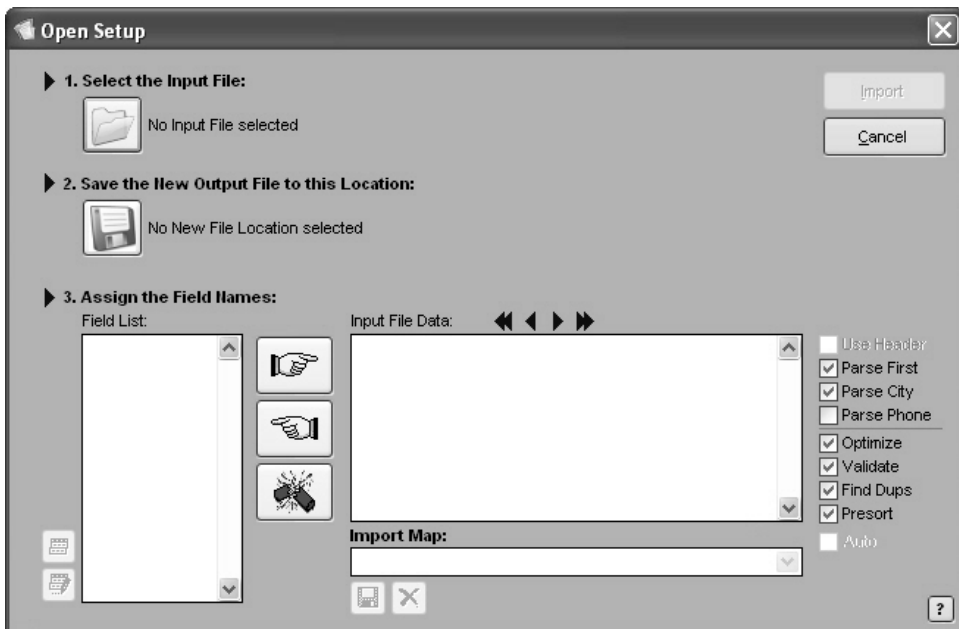
- Click OK.

OPENING A NEW LIST

SmartAddresser 5 allows you to automatically convert many popular file formats without knowing the structure or type of file in advance. The Open List feature opens the file, creates a FoxPro database file (dbf) in the directory that you choose, and requires you to map the Input File Data to the Field List. The features in the Open Setup window provide you with ultimate control over how the data will look and how it will be processed within the *SmartAddresser 5* Program.

Selecting the Input File:

- From the File menu, choose Open List. The Open Setup window will appear:



- Click the Open button  located under Select the Input File. An Open dialog box will appear.
- In the Open dialog box, browse the hard disk and locate the desired file. Select the file and click OK. *SmartAddresser 5* will take a moment to determine the file type. Once this process is finished, *SmartAddresser 5* will display the file type information and the location of the file.



TIP! If the file is determined to be a Fixed Length Text format, a Fixed Length Setup window will appear. See ***Opening Fixed Length Text Formats*** for complete instructions. If the file is determined to be a Label format, a Label Format Setup window will appear. See ***Opening Label Format Files*** for complete instructions.

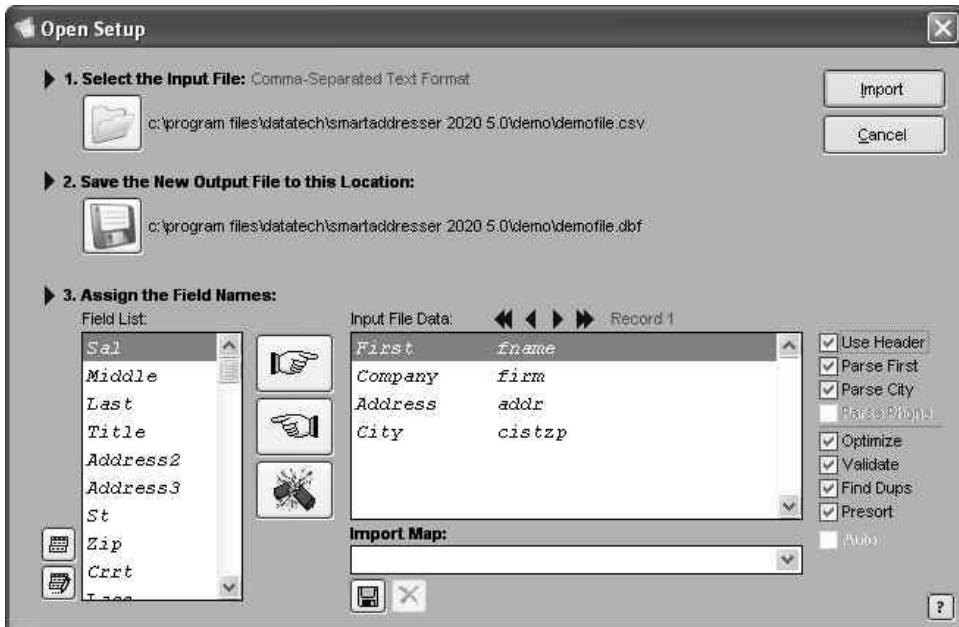
Saving the New Output File:

When *SmartAddresser 5* opens a file it creates an *SmartAddresser 5* Database in DBF format that can be opened anytime without repeating the importing process. By default, the program will save the *SmartAddresser 5* Database to the same location as the Input File. However, you can choose a different location by following the steps below:

- Click the Save button located under Save the New Output File to This Location in the Open Setup window. A Save As dialog box will appear.
 - Type in the desired Output File name.
 - Browse to the desired folder on your hard disk where you want to save the file. Click Save. *SmartAddresser 5* will display the Output File location in the Open Setup window.
 - Continue to the next step, Mapping the Fields.
-

MAPPING THE FIELDS

Once the Input File has been opened, and the Output File location has been specified, you must assign the field names to your data. This is called *mapping*. The Field List will be displayed on the left side of the window and your data will be displayed under Input File Data on the right side of the window. The objective is to assign field names from the Field List on the left to the Input File Data on the right.



Assigning the Field Names:

Mapping the fields can be done easily using the buttons within the Open Setup window. First, select the field name to be assigned to the data from the Field List, then use the buttons as described below:



Maps the highlighted field names from the Field List to the highlighted Input File Data.



Removes the field name from the selected Input File Data.



Resets all the field names in the Input File Data.



TIP!

You can also assign field names to the selected Input File Data by simply double clicking on the field name in the Field List!

SmartAddresser 5 is designed to automate processes wherever possible. In the Open Setup window, there are some great features described below that will simplify the mapping process.

Automatic Field Mapping:

SmartAddresser 5 has a built in automated mapping feature that contains a cross reference for commonly used field names in Header Records (typically the first record in an input file). You can add your own commonly used field names to the cross reference to make field mapping easier in the future. See ***Automatic Field Mapping*** for more information.

Editing the Field List:

Additional field names can be added to the Field List if you do not see an appropriate match in the existing Field List by following the instructions below:

- Click the Edit Field List button . The Table Designer will open.
- Click the mouse in the table at the point where you want to add the field.
- Click Insert. A new field will appear and will be highlighted.
- Type the desired field name and adjust the field type and length as desired.
- Click OK.
- Click Yes to make the structure changes permanent.

*For more information on the Table Designer, see **Editing the Table Design**.*

Saving the Mapping Sequence:

After the field mapping is complete, you can save the mapping sequence for other files that have the exact same format by following these steps:

- Click the Save button  that appears next to the Import Map at the bottom of the Open Setup window. In the Save As dialog box, the file name will appear under Save Map As. The file name will have a .imp extension. By default, the map will save using the file name that you are importing. However, if you would like to use a different name for your map, highlight the file name and change it. *Do not browse to a new location* - the Import Maps folder will be selected automatically, and only import maps saved in the Import Maps folder will be displayed in the pull-down menu.
- Click Save. Notice that your Import Map has been saved so that you can select it in the future from the Import Map pop-up.
- To delete the Import Map, click the Delete button  .



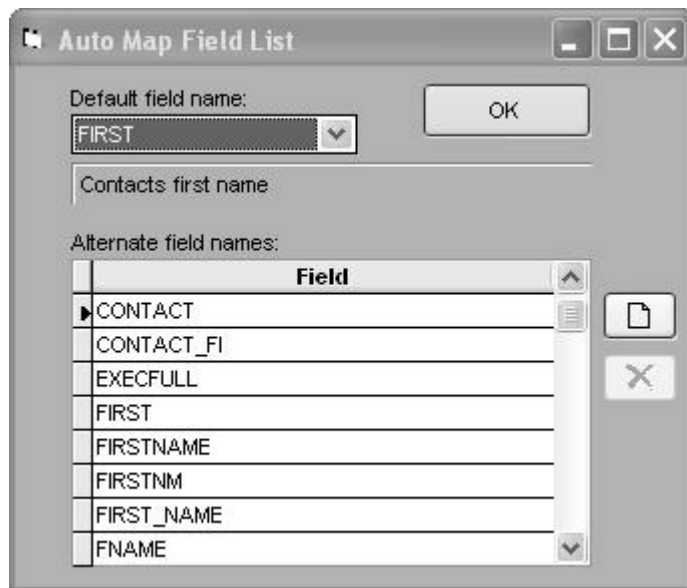
TIP!

*For information on the check boxes in the Open Setup window, see **Import Options**.*

AUTOMATIC FIELD MAPPING

SmartAddresser 5 has a built in automatic mapping feature that contains a cross reference of commonly used field names in Header Records (typically the first record in an Input File). For example, the input field FIRST_NAME is equivalent to FIRST in the Field List because it is referred to in the Auto Map Field List window. Common Auto Maps are already setup within the program. However, if you would like to add your own Auto Maps, you can edit the Auto Map Field List. The Auto Map Field List can be modified in the *SmartAddresser 5* Properties or in the Open Setup window.

- Click the Edit Auto Map Field List button . The Auto Map Field List window will appear:



- Select the desired Default Field Name from the Default Field Name pop-up.
- Click the New button .
- In the newly created record, type in the equivalent field name that you would like to match.
- Click OK.



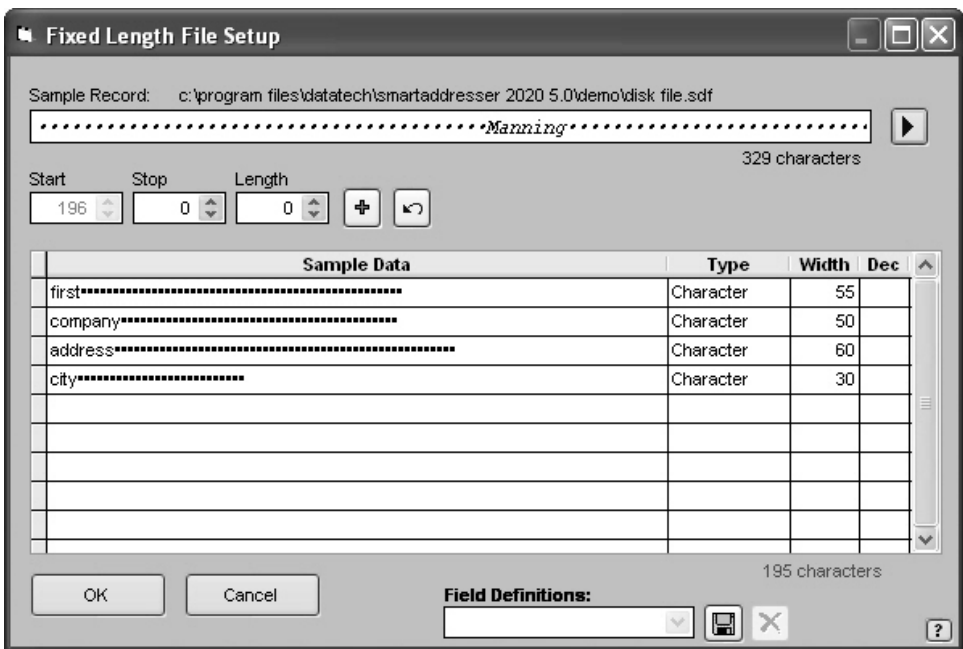
TIP!

To remove an Auto Map Field Name in the list, select it and click the Delete button . Header Records are not always included with every file type. However, if you have a Header Record, simply check the box that says Use Header in the Open Setup window. Field names that do not appear in the Field List or in the Auto Map list will keep their current field name in *SmartAddresser* 5.

OPENING FIXED LENGTH TEXT FORMATS

SmartAddresser 5 now has one of the best Fixed Length Text file importing features available on the market today, allowing you to easily define the field lengths. After the format is determined, you can actually save the structure. Then, the next time you have a file with the same format, you can simply choose the predefined Field Definitions.

- From the File menu choose Open List.
- Click the Open Folder button. An Open dialog box will appear.
- In the Open dialog box, browse your hard disk and locate the desired file. Select the file and click OK. The Fixed Length File Setup window will appear.



The **Fixed Length File Setup** window displays a sample record and a table for defining field widths.

Sample Record: c:\program files\data tech\smartaddresser 2020 5.0\demo\disk file.sdf

.....Manning..... 329 characters

Start: 196 Stop: 0 Length: 0

Sample Data	Type	Width	Dec
first.....	Character	55	
company.....	Character	50	
address.....	Character	60	
city.....	Character	30	

195 characters

Field Definitions:



TIP! Put your mouse over the edge or corner of the window and click and drag to expand the window for a better view.

Your objective is to determine the field widths in the Fixed Length File Setup window. Your file data will be displayed in the Sample Record along with the name and

location of the Fixed Length text file. There are four different techniques for you to choose from when defining a Fixed Length Text file structure. Each technique is described in detail below:

Technique #1:

- Click the cursor at the end of the first field and click the plus button .

Notice that the data from the first field moved to the Sample Data area and SmartAddresser 5 filled in the field Type and Length. Also notice the cursor in the Sample Record is now located at the beginning of the second field.

- Repeat the above steps until all of the fields are defined in the Sample Data.
- Click OK. The Input File Data will be displayed in the Open Setup window.
- See [Opening a New List](#) for further instructions.

Technique #2:

- Left-click with your mouse at the end of the first field and then right-click to select the field break.

Notice that the data from the first field moved to the Sample Data area and SmartAddresser 5 filled in the field Type and Length. Also notice the cursor in the Sample Record is now located at the beginning of the second field.

- Continue to left and right-click at the end of each field until all fields are listed correctly under Sample Data.
- Click OK. The Input File Data will be displayed in the Open Setup window.
- See [Opening a New List](#) for further instructions.

Technique #3:

- Click the cursor into the Length box and type in the Length of the first field.

- Click the Plus button .

Notice that the data from the first field is displayed in the Sample Data and SmartAddresser 5 filled in the field Type and Length. Also notice that the cursor is located at the beginning of the second field in the Sample Record.

SmartAddresser 5

- Type in the Length of each field and click the Plus button after each entry until all the fields are listed correctly under Sample Data.
- Click OK. The Input File Data will be displayed in the Open Setup window.
- See for [Opening a New List](#) for further instructions.

Technique #4:

- Click into the Stop box and type in the amount of characters contained in the first field.
- Click the Plus button .

Notice that the data from the first field moved to the Sample Data area and SmartAddresser 5 filled in the field Type and Length. Also notice that the cursor is located at the beginning of the second field in the Sample Record and the Start data is one number higher than the Stop position of the last field.

- Type in the Stop position for each field and click the Plus button after each entry until all fields are listed correctly under Sample Data.
- Click OK. The Input File Data will be displayed in the Open Setup window.
- See [Opening a New List](#) for further instructions.



You can use the Undo button to go back to the previous field in the Fixed Length Setup window. You can also click the Next Record button to move to the next record in your list to help determine the field Lengths.

TIP!

Saving the Fixed Length Structure:

You can save the Fixed Length Structure to use when you import Fixed Length Text files with the exact same structure. We recommend that you use this feature to save yourself time with future imports.

- After you have setup your Fixed Length File Structure, Click the Disk button at the bottom of the Fixed Length Setup window. A Save As dialog box will appear. In the Save As dialog box, the file name will appear under Save Map As. The file name will have an .fmp extension. By default, the map will save

using the file name that you are importing. However, if you would like to use a different name for your map, highlight the file name and change it. Do not browse to a new location - the Field Maps folder will be selected automatically.

- Press Save.
- The next time you import a file with the same format, select the Structure from Field Definitions.



TIP!

You can use the Undo button to go back to the previous field in the Fixed Length Setup window. You can also click the Next Record button to move to the next record in your list to help determine the field Lengths.

OPENING LABEL FORMAT FILES

Most Label Format files have a consistent number of lines in each record. *SmartAddresser 5* will convert the file to DBF format based on this information. If the file does not have a consistent number of lines, the file must be converted in another program before it can be opened in *SmartAddresser 5*.

Follow the steps below to open a Label Format file:

- From the File menu, choose Open List.
- Click the Open Folder button . An Open dialog box will appear.
- In the Open dialog box, browse your hard disk and locate the desired file. Select the file and click OK. The Label Format window will appear.
- Type in the number of lines that make up each record.
- Click OK. The Input File Data will be displayed in the Open Setup window.
- See [Opening a New List](#) for further instructions.

OPENING A DBF FILE

It is simple to open a DBF format with *SmartAddresser 5*. The program will preserve the file structure when it is opened in *SmartAddresser 5*, unless you change it yourself while in the program.

Follow the steps below to open a DBF:

- From the File menu, choose Open Database. *An Open dialog box will appear.*
- In the Open dialog box, browse the hard disk and locate the desired file. Select the file and click OK.

SmartAddresser 5 will immediately open the file.



TIP! If the file does not open or an error occurs, try choosing Open List from the File menu so the program can determine the file format for you.

A DBF will always have a Header Record. The Header Record contains the names of the fields. *SmartAddresser 5* does have some required fields that allow the program to locate the data during processing. When a DBF is opened, the Header Record is automatically used to determine the field names.

When you begin to process a DBF in *SmartAddresser 5*, all of the required field names may not be assigned to the coinciding data. In this case, the program will prompt you to assign the proper field names to the data with a Missing Fields window.



TIP! Assigning field names to a DBF does not change the field name. The process only cross-references the original field name to the *SmartAddresser 5* field name.

The Auto Map feature will cross reference the field names and use the required *SmartAddresser 5* field name if the field name exists in the Auto Map list. If the field name is not cross-referenced in the Auto Map list, *SmartAddresser 5* will recommend that you add the required field by putting a plus sign in front of the required field. The fields from the Database are displayed on the left side of the screen. Your objective is to assign your DBF field name to the required *SmartAddresser 5* field name. If you do not assign data to the fields with the plus signs, the fields will be added automatically.



TIP!

If you do not want a field to be created, double-click on the field to remove the +. If you do not add the field, the process that requires that field will not be completed.

- Select the field to be added under +Add/Mapped.
- Map a field from the database by double-clicking on it or using the pointing finger buttons.
- Continue mapping fields from the database to the missing fields until all missing fields are mapped.
- Click OK.



TIP!

You can also create unique field names for the Field List in the Table Designer or add field names to the Auto Map list while in the Missing Fields window.

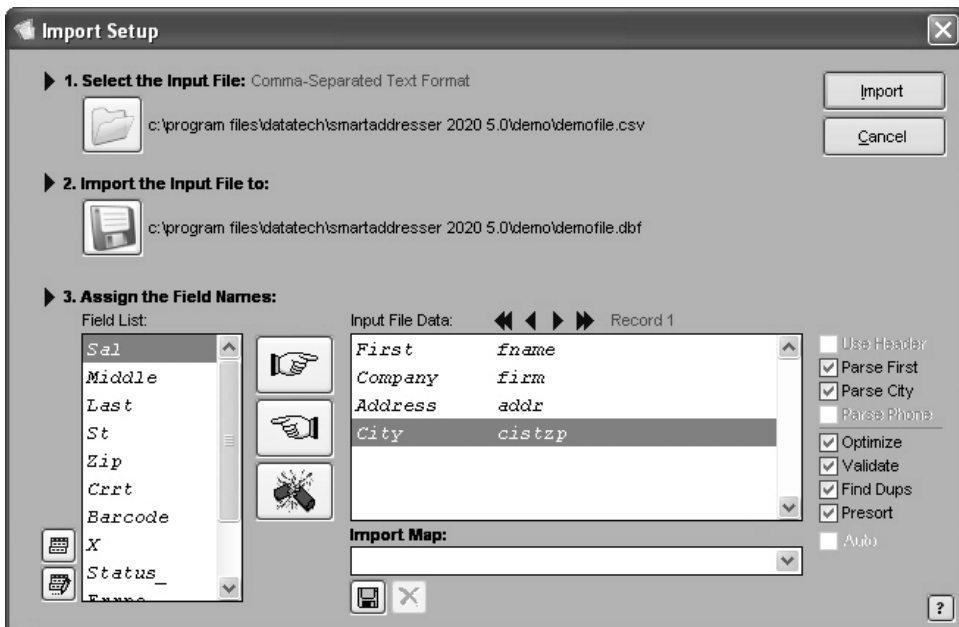
IMPORTING DATA INTO AN ACTIVE DATABASE

The Import feature in *SmartAddresser 5* adds records from a file to the current active database. This feature is most commonly used to combine two or more lists, or to import a file into a blank template that has been created. The import feature can convert files from many popular file formats. See **File Types** for a list of supported file formats.

Follow the steps below to Import a file into an existing *SmartAddresser 5* Database.

- From the File menu, choose Import or click on the Import button in the main toolbar.

The Import Setup window will appear.



- Click the Open button located under Select the Input File.

An Open dialog box will appear.

- In the Open dialog box, browse the hard disk and locate the desired file. Select the file and click OK.

SmartAddresser 5 will take a moment to determine the file type. Once this process is finished, SmartAddresser 5 will display the file type information and the location of the file.



TIP!

If the file is determined to be a Fixed Length Text format, a Fixed Length Setup window will appear. See [Opening Fixed Length Text Formats](#) for complete instructions. If the file is determined to be a Label format, a Label Format Setup window will appear. See [Opening Label Format Files](#) for complete instructions.

- See [Mapping the Fields](#) for instructions on matching the fields in the existing database to the file that you are importing.

Only mapped fields will be imported.

- Click Import.



For information on the check boxes in the Import Setup window, see [Import Options](#).

TIP!

IMPORT OPTIONS

There are eight check boxes in the Open Setup window. The check boxes enable processing to automatically begin after the file has been imported. With the exception of the Use Header check box, all of these features are available from the menus within the program after the file is imported. So, if you prefer to view your list before processing, do not check any of the boxes. Each checkbox and its function is explained below:

Use Header

* Check this box to use an existing Header Record (typically the first record in an Input File) as field names in the *SmartAddresser 5* Database. The field names that match our default names will be moved from the Field List to the Input File Data automatically, just as if you matched them manually. If the field name exists in the Auto Map dictionary, the required field names will be used to identify the data. See Automatic Field Mapping for more information

Parse First

* If the field name FIRST is mapped to the full name data in the Input File Data, the Parse First check box will be enabled. When this box is checked, the full name data will be separated into the fields, SAL, FIRST, MIDDLE and LAST when the list is imported. See Parsing First and City for more information.

Parse City

* The Parse City check box will be enabled if the field name CITY is mapped to a single field that contains the City, State and ZIP code. If you check the Parse City check box, *SmartAddresser 5* will automatically create the fields ST and ZIP to accommodate this information when the field is parsed. See Parsing First and City for more information.

Parse Phone

* The Parse Phone check box will be enabled if one of the three phone fields is mapped to the data in the Input File Data. A Parse Phone window will appear after the file is imported so that you can determine the desired format for the phone data. See Parsing the Phone Fields for more information.

Optimize Database

* Optimizing the Database improves performance when validating and presorting the list. When you check the Optimize Database check box, *SmartAddresser 5* displays the Optimize Database window after the file is imported so that you can determine the extent of optimization that you want the program to do. See Optimizing the Database for more information.

Validate Records

* The Validate Records check box will display the Validate Records window after the file is imported and all requested optimization and parsing is complete. See Validating Records for more information.

Find Dups

* The Show Duplicates check box will display the Show Duplicates window after the file is imported and all requested optimization, parsing and validation is complete. It is recommended that you Validate the records before you Show Duplicates. See Duplicate Detection for more information.

Presort

* The Presort check box will display the Presort Setup window after the file is imported and all requested optimization, parsing, validation, and duplicate detection is complete. See Presorting the Mail for more information.



TIP! Your settings in the Open Setup window are always saved. The next time that you import a file, make sure that you want to keep the same settings.

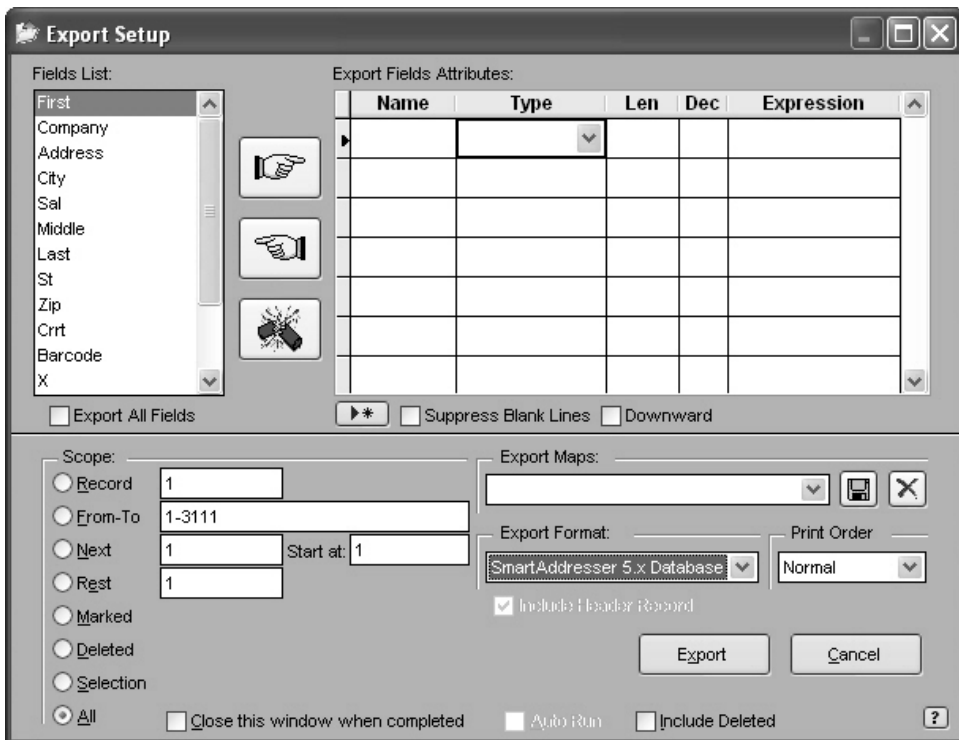
EXPORTING THE DATA

The Export feature allows you to save the data in your list to disk in many different file formats. The Export Setup window supports the scope radio buttons so you can export specific sets of data. This feature also supports expression building, which will allow you to combine fields or separate the components of a field. Field widths can be adjusted, and the type of the field can be modified as well.

Follow the steps below to Export data from a *SmartAddresser 5* Database.

- From the File menu, choose Export or click on the Export button  in the main toolbar.

The Export Setup window will appear.



The screenshot shows the 'Export Setup' dialog box. It has a 'Fields List' on the left with fields: First, Company, Address, City, Sal, Middle, Last, St, Zip, Crrt, Barcode, and X. In the center, there are three pointing finger icons. On the right, the 'Export Fields Attributes' table is shown with columns: Name, Type, Len, Dec, and Expression. Below the table are checkboxes for 'Export All Fields', 'Suppress Blank Lines', and 'Downward'. At the bottom, there are sections for 'Scope' (with radio buttons for Record, From-To, Next, Rest, Marked, Deleted, Selection, and All), 'Export Maps' (with a dropdown and icons), 'Export Format' (set to 'SmartAddresser 5.x Database'), 'Print Order' (set to 'Normal'), and 'Include Header Record' (checked). There are also checkboxes for 'Close this window when completed', 'Auto Run', and 'Include Deleted', along with 'Export' and 'Cancel' buttons.

- Select the fields that you want to export by double-clicking in the Field List or click on the field and use the pointing finger buttons to move each field, or, click the Export All Fields check box if desired.
- Adjust the field Type and Length as desired.
- If you would like to combine fields or separate field components, click into the Expression box and type the desired expression.
- You can use Expressions to combine two fields or to rename the fields as you're exporting. For example, to combine FIRST and LAST name with a space between them and to change the field name to NAME, you would use the Expression:

ALLT(first)+" "+ALLT(last)

For assistance on writing Expressions, contact SmartSoft Technical Support. See [Technical Support Options](#) for more information.

- Click on the desired radio button that will best determine your scope for exporting records.

For information on scope radio buttons, see [Consistent Window Formats](#).

- Choose the desired file format from the Export Format pop-up.
- Click the Include Header Record check box if desired.

The Include Header Record check box will not be available for file types that already contain a header record by default.

- Click Export.

Saving the Export Map:

Once you have set up an Export Map, you can save the mapping to use again when you want to export data with the same output fields by following the steps below:

- Click the Disk button .

In the Save As dialog box, the file name will appear under Save Map As. The file name will have a .emp extension. By default, the map will save using the file name that you are exporting. However, if you would like to use a different name for your map, highlight the file name and change it.

Do not browse to a new location - the Field Maps folder will be selected automatically.

- Click Save.

Notice that your Export Map has been saved so that you can select it in the future from the Export Map pull-down menu.

- To delete the Export Map, click the Delete button .

VIEWING THE DATA

THE LIST VIEW

The List View is the primary view of the data in spreadsheet format within *SmartAddresser 5*. When you are viewing your data in List View, you can use all of the Toolbar Buttons, the Look In feature, the Show and Count features, and you will be able to access all menu items. Each of these topics is covered within the Help System in detail. Click on the Menus and Features in the image below to obtain further information.

SmartAddresser 5.0 (v5.3.31)

File Edit Select Sort Special View Additions Help

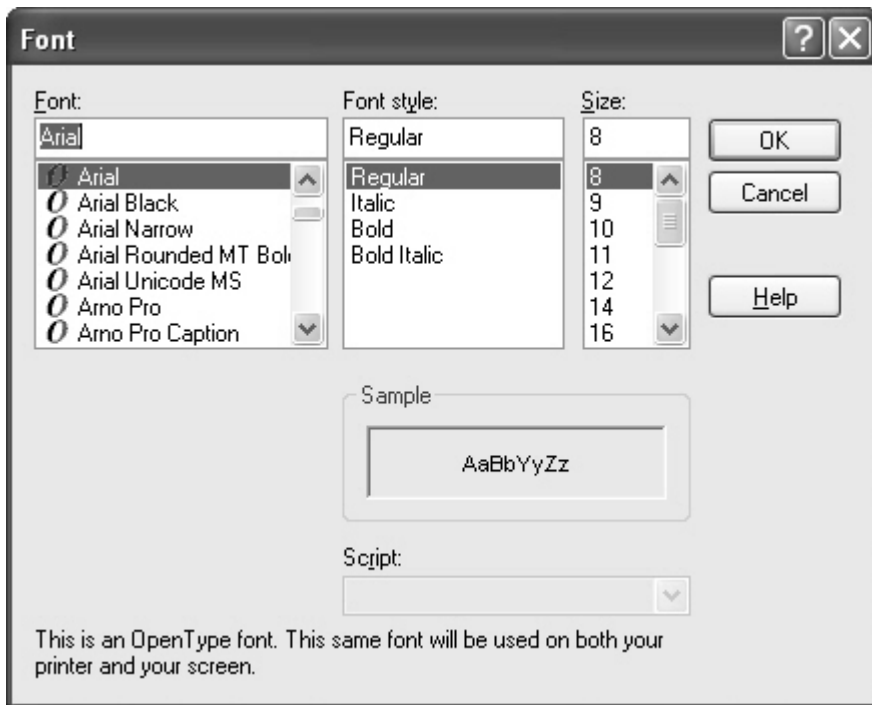
Demofile

Look in: Zip Find: ☐ Contains Show: All Records ☐ Disable Count Σ 3

	First	Company	Address	City
☐		firm	addr	cistzp
☐	A	Crestview Square	701 NorthMain Street	96101
☐	A	Ascs Building	11801 Waagner St	90230
☐	A	South California Nursery	5526 S Sepulveda Blvd	Culver City
☐	Abdul	Frank Exterminating Co	4800 Salem Village Court	90230
☐	Adriana	Cominiques Boutique	5105 Inglewood Blvd Apt 201	Culver City
☐	Alandia	Cars And Shingles Truck Stop	Post Office Box 601	Boron
☐	Albert	Chapel North Bldg	4900 Overland	Culver City
☐	Albert	Chans Glasses	Post Office Box 8277	Emeryville
☐	Christina	Sauls Orinoco River Rides	6220 Bristol Pkwy Apt 210	Culver City
☐	Albert	Cond Casa Albonito	Post Office Box 3601	Glendale
☐	Alexander	Kiley Wilson	Post Office Box 5881	Beverly Hills
☐	Alfred	Hotel Traylor	301 S Main Street	Alturas
☐	Kristia		6220 Bristol Pkwy Apt 211	Culver City
☐	Alfred	Moon Beams And Dirt Inc.	3559 Greenwood Avenue	City Of Commerce
☐	Alice	Cell Robotics B1	Post Office Box 8031	Emeryville
☐	Allen	Archy Filmores Tooth Repair	Post Office Box K	Duarte
☐	John	Foot Store	100 Olive Ave	Burbank
☐	Alta	Farkleberry Cafe	Post Office Box B	Duarte
☐	Mount Saint	Ganem & Ganem	6 Alexandur	Buffalo
☐	Amario	Sandy Beaches Clothing Store	101 NorthDanhauser Street	Alturas
☐	Amy	Rons Roller Coaster Rides	Post Office Box 1491	Duarte
☐	Ancil	Programmers Workbench Inc.	30601 Crag View Dr	Dunsmuir
☐	Andrew	Frank Exterminating Co	5001 Cascade Ct	Culver City

CHANGING THE FONT

It's extremely easy to change the font and style of your data in *SmartAddresser 5's* List View! Change the size or style of your display by clicking on View>Font from the main List View window.



Changing the font will only affect the display font. To print labels or reports in a different font, see Changing Printing Fonts.

TIP!

USER DEFINED SORTING

SmartAddresser 5 can sort by any field in your list. The most common sorts, LAST, COMPANY, ADDRESS and ZIP CODE, are listed under the Sort menu. However, you can create your own User Defined sort on a single field or build a multi-level sort with *SmartAddresser 5*!

Follow the steps below to build a User Defined sort:

- From the Sort menu, choose User Defined.

The User Defined Sort window will appear. The first time that you open this window, it will default to the Create tab to allow you to create a new sort. After you have created one or more sorts the window will default to the Sorts tab where you can select an existing sort.

User Defined Sort

Sorts Create

1. Select a field name:
First

2. Order field:
☒ Ascending ☐ Descending

3. Add to sort criteria: ▼

Edit:

Sort Name:
Sort Description:

☐ Display unique records only

- Select a field name that you would like to sort from the pop-up.
- Choose the Ascending or the Descending radio button.

The Ascending option will sort the list from lowest to highest, and the Descending option will sort from highest to lowest.



TIP!

If you are creating a multi-level sort on more than one field and you sort one field in Ascending order and another in Descending order your indexes will be permanently rebuilt. Once this is done, there is no way to return the list to its original order. A warning will appear on your screen declaring the pending index restructuring before the sort is performed.

- Click the Add button to add the field to the sort criteria.

The sort will be automatically named after the first field that you Select with the word "my" in front of it, for example, mycompany. Typing a new name into the text box will change the sort name. The next time that you want to use the sort sequence, select it from the Sorts tab.

- Continue to add fields as desired by repeating the above steps.
- Click Display.

The records will be displayed in sort order on your screen.



TIP!

To save a sort that you have created, click the Build Sort Keys button. When you are ready to sort the list, click Display.

Use the Edit text box to enter Foxpro Expressions so that you can define the sort more closely. For example, if you were to sort on the ZIP field and you only wanted to consider the 5-Digit ZIP, the Expression would be left(zip,5). [Contact Technical Support](#) for help on writing Expressions.

Follow the steps below to use a Foxpro Expression to define your sort criteria:

- Follow steps 1 through 4 above.
- Double-click on the field in the Sort Criteria.

The cursor will move to the Edit text box.

- Type in the desired Expression and press Enter.
- Continue to step 5 above.

SORTING BY DEFAULT FIELD NAMES

SmartAddresser 5 can sort by any field in your list using [User Defined Sorting](#). However, the most common sorts; LAST, COMPANY, ADDRESS and ZIP CODE, are listed under the Sort menu as shown below.



	First	Company	Address	City
		firm	addr	cistzp
	A	Crestview Square	701 NorthMain Street	96101
	A	Ascs Building	11801 Waagner St	90230
	A	South California Nursery	5526 S Sepulveda Blvd	Culver City
	Abdul	Frank Exterminating Co	4800 Salem Village Court	90230
	Adriana	Cominiques Boutique	5105 Inglewood Blvd Apt 201	Culver City
	Alandia	Cars And Shingles Truck Stop	Post Office Box 601	Boron
	Albert	Chapel North Bldg	4900 Overland	Culver City
	Albert	Chans Glasses	Post Office Box 8277	Emeryville
	Christina	Sauls Orinoco River Rides	6220 Bristol Pkwy Apt 210	Culver City
	Albert	Cond Casa Albonito	Post Office Box 3601	Glendale
	Alexander	Kiley Wilson	Post Office Box 5881	Beverly Hills
	Alfred	Hotel Traylor	301 S Main Street	Alturas
	Kristia		6220 Bristol Pkwy Apt 211	Culver City
	Alfred	Moon Beams And Dirt Inc.	3559 Greenwood Avenue	City Of Commerce
	Alice	Cell Robotics B1	Post Office Box 8031	Emeryville
	Allen	Archy Filmores Tooth Repair	Post Office Box K	Duarte
	John	Foot Store	100 Olive Ave	Burbank
	Alta	Farkleberry Cafe	Post Office Box B	Duarte
	Mount Saint	Ganem & Ganem	6 Alexandur	Buffalo
	Amario	Sandy Beaches Clothing Store	101 NorthDanhauser Street	Alturas
	Amy	Rons Roller Coaster Rides	Post Office Box 1491	Duarte
	Ancil	Programmers Workbench Inc.	30601 Crag View Dr	Dunsmuir
	Andrew	Frank Exterminating Co	5001 Cascade Ct	Culver City

When you choose one of these fields from the Sort menu, your list will be put in the ascending order of the field instantly. After selecting one of the field names, a check mark will be placed next the selected field in the Sort menu. If you select the field from the Sort menu again, the check mark will be removed and the sort will be undone. The data will return to its original order.

To create a sort on other fields or a combination of fields, refer to [User Defined Sorting](#).



Using the sort options will *not* reorder the record numbers within a database!

TIP!

MANIPULATING DATA

ADDING NEW RECORDS

Use the New Record feature when you want to add a record to your database. You can add a New Record in List View or Card View.

- From the Select menu choose New Record (or press CTRL+N on your keyboard).
- Enter the desired data into the fields in the New Record.

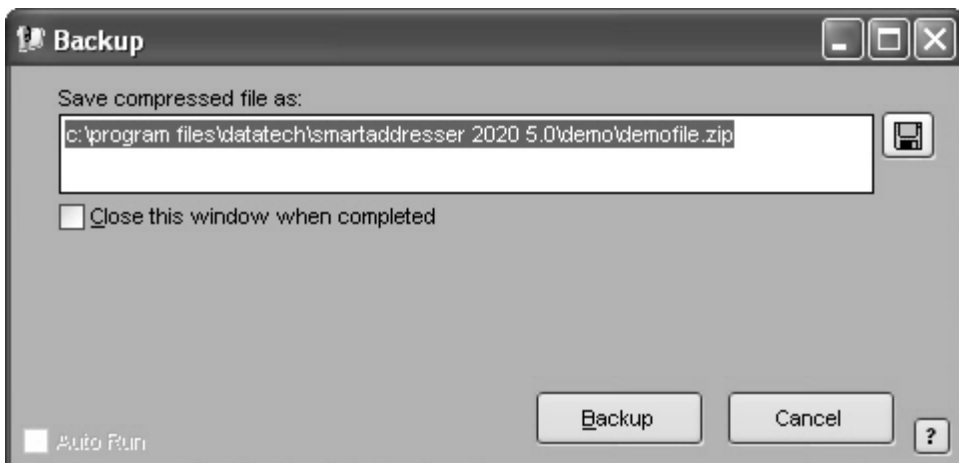
BACKING UP DATA

The Backup feature in *SmartAddresser 5* compresses your *SmartAddresser 5* Database to a .zip format. By default, the resulting .zip file will be stored in the same directory as your actual database. However, you can change the path and save the zipped file to another location. The compressed file can be decompressed using WinZip or by Restoring it in *SmartAddresser 5*. It is not required to have any compression software on your computer to use the Backup and Restore features in *SmartAddresser 5*.

Follow the steps below to create a Backup of a file:

- From the File menu, choose Backup.

The Backup window will appear.



- If you would like to save the compressed file to a different location click the Save button.
- Click Backup.



TIP!

For information on restoring or decompressing your compressed list see [Restoring Data](#).

CLEARING MARKS

The Clear Marks feature allows you to clear records that are Marked in the database. See [Marking Records](#) for more information on Marked records.

Follow the steps below to Clear Marks:

- From the Edit menu, choose Clear Marks.

The Clear Marks window will appear

- Click on the desired radio button that will best determine your scope for clearing marked records.

For information on scope radio buttons, see [Consistent Window Formats](#).

- Click Clear.

COMMAND WINDOW

Use the Command Window when there is not a feature available in *SmartAddresser 5* to do what you want with the data in your list. For instance, you may want to add a sequence number to your list, or create an output field that contains certain information about each record to create your own key for searching. There are many powerful uses for the Command Window. To use this feature, you do not have to be a programmer! We offer many resources to help you build Command Statements, including our many [technical support options](#). It may be helpful to purchase a good reference book on Microsoft® FoxPro® for Windows if you desire to learn more information about command statement syntax. Commands on the web site can even be copied and pasted directly into the Command Window!

Command Statements are stored in the *SmartAddresser 5\Commands* folder as a simple text file. They can be transferred to another computer, or e-mailed and placed in the folder directly. This allows our Technical Support staff to write Command Statements for you and e-mail them to you.

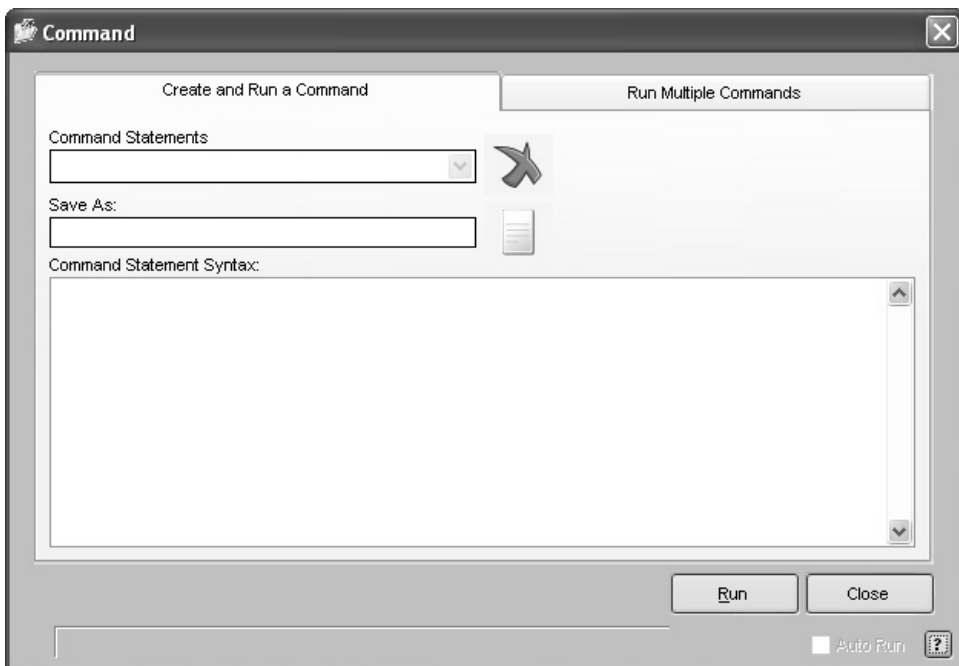
Follow the steps below to create and run a Command:

- From the Edit menu, choose Command or click on the Command button



in the toolbar.

The Command Window will appear.



- Type a name for the Command in the Save As text box and press Tab.
- Type or paste the Command into the Command Statement Syntax box.
- Click Run.

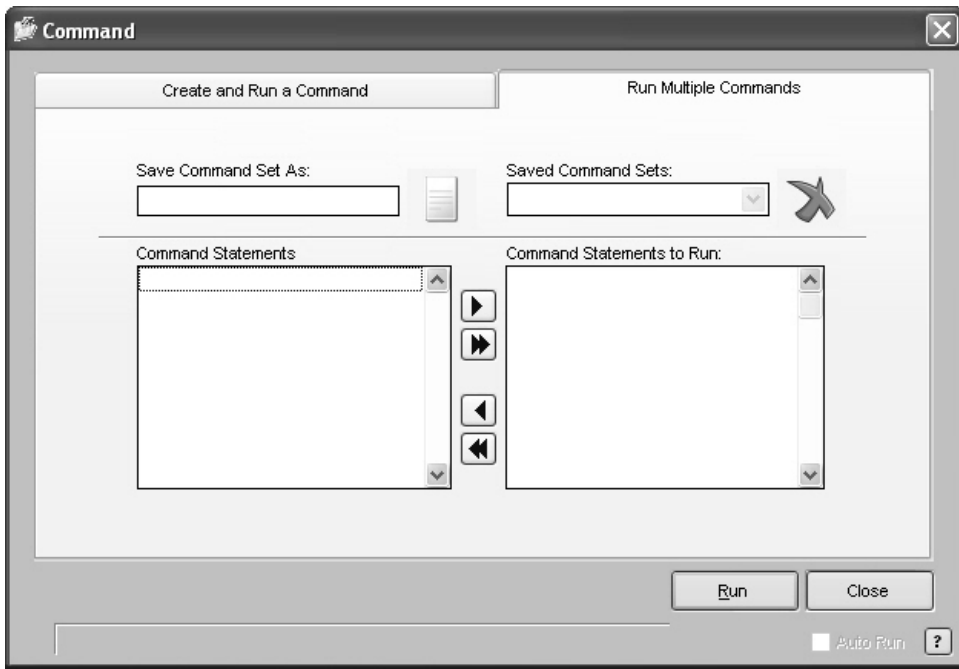


TIP! If you have used the Command feature previously, stored commands will appear in the Command Statements pull-down menu. To enter a new command, click the New button, type in the new command name and then press Tab.

You can run multiple commands and group the commands into a set to accomplish multiple tasks with just the click of a button. For example, a periodical mailer may want to Fill the subscribe_ field with a "T" (or an "F") based on the subscription data, and then fill a "1" into the copies_ field (when the copies_ field is empty), and finally add a sequence number to the list...all at once. This would be a set of multiple commands. Now imagine that this same periodical mailer runs a new list twice a week, and needs to perform these same steps each time. Running multiple Command Statements would be a time saver in this scenario.

- In the Command window, click the Run Multiple Commands tab.

The Run Multiple Commands setup will appear. All Command Statements that you have built in the past will appear in the window listed under "Command Statements" and the "Save Command Set As:" text box will be highlighted.



- Type a name for the Command Set.
- Select the Command Statement(s) that you would like to include in the set by double-clicking on each individually or by using the arrows in the middle of the window to move the commands.
- Press Run.



The program will automatically save the Command Set. The next time you want to Run the Command Set, select the set from the Saved Command Sets pop-up.

TIP!

CUT, COPY, AND PASTE

The Cut, Copy and Paste features in *SmartAddresser 5* work in any field or on any data. The features can be accessed from the Edit menu in *SmartAddresser 5* or by using

the appropriate Windows shortcuts, Ctrl+X, Ctrl+C, or Ctrl+V, respectively. Each of these features is explained below:

Cut

Removes selected text from any field, record or file or from text editing regions in dialogs. The text is placed on the Clipboard. Use Cut when you want to remove a selection of data from one location and place it in a different location using Paste.

Copy

Duplicates the selection (without removing it) and places the copy in the Clipboard, where it can be accessed using the Paste feature.

Paste

Inserts a copy of the Clipboard contents into the current file or field at the cursor location. If text is selected and you choose Paste from the Edit menu, the contents of the Clipboard will replace the selected text.

DELETING RECORDS

The Delete feature allows you to tag records for deletion. Once you have determined that you want to permanently delete the record you can use the Pack Database feature. Deleted records will be tagged with a black bar to the left of the record in List View and will be dimmed. By default, deleted records are not included in many processes in *SmartAddresser 5*. However, most windows include a check box so you can choose whether or not you want to include the deleted items in the process.

Follow the steps below to tag records for deletion:

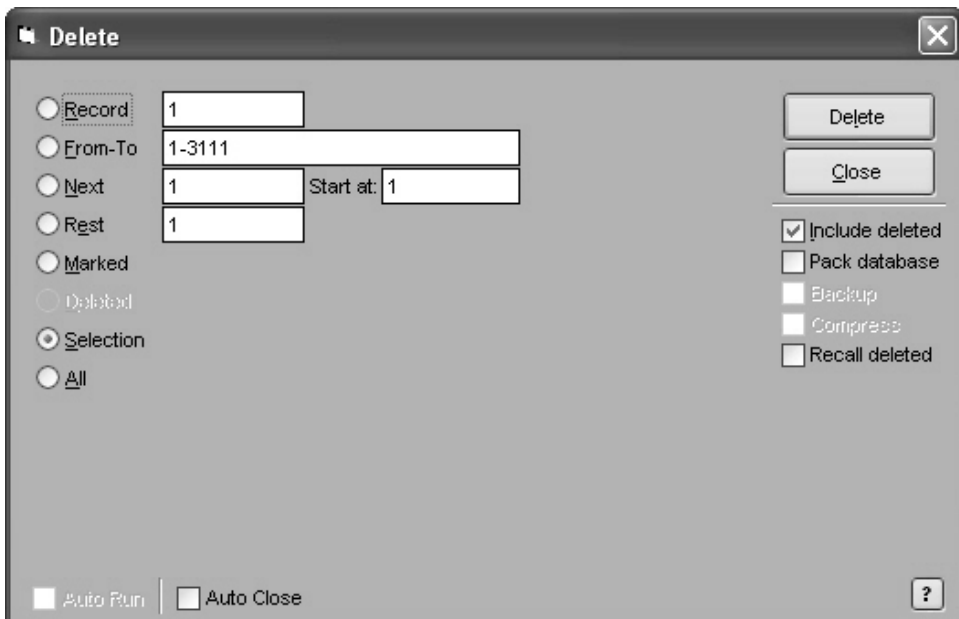
To Delete one record at a time:

- Click on the record that you want to delete.
- Click on the Delete/Recall button in the toolbar.

The record will be dimmed in the list and a black bar will appear to the left of the record.

To Delete a group of records:

- From the Edit menu, choose Delete. The Delete window will appear:



Delete Window

- Click on the desired radio button that will best determine your scope for deleting records. For information on scope radio buttons, see [Consistent Window Formats](#).
- Check the Pack Database box if you want all deleted records PERMANENTLY removed from your database.
- Check Recall Deleted to recall all previously deleted records in the list if desired.
- Check Backup Deleted or Compress Backup if desired. When you chose to backup your deleted items, a Save As dialog box will appear after you click Delete so you can choose the name and location for your backup file.
- Click Delete.

When you have finished deleting records or checking for duplicates, the deleted records will still appear in the database, but they will be dim and the record will be tagged with a black bar in the left column of the list view as shown below.

Adriana	Cominiques Boutique	5105 Inglewood Blvd Apt 201
Alandia	Cars And Shingles Truck Stop	Post Office Box 601
Albert	Chapel North Bldg	4900 Overland
Albert	Chans Glasses	Post Office Box 8277
Christina	Sauls Orinoco River Rides	6220 Bristol Pkwy Apt 210
Albert	Cond Casa Ailbonito	Post Office Box 3601
Alexander	Kiley Wilson	Post Office Box 5881
Alfred	Hotel Traylor	301 S Main Street
Kristia		6220 Bristol Pkwy Apt 211
Alfred	Moon Beams And Dirt Inc.	3559 Greenwood Avenue

When you decide that you permanently want to remove all records that are tagged for deletion from the list you will Pack the Database. See Packing the Database for further instructions.

DUPLICATING RECORDS

The Duplicate feature allows you to make copies of one or multiple records. This is useful when you have different people at the same address. In this case, you can Duplicate the address and then change the contact name. You could also use Duplicate to create another list with a particular scope of records in the database.

Follow the steps below to Duplicate records:

- From the Edit menu, choose Duplicate.

The Duplicate window will appear.

- Click on the desired radio button that will best determine your scope for Duplicating records.

For information on scope radio buttons, see [Consistent Window Formats](#).

- Indicate how many duplicates that you would like to create in the Duplicate each record ___ times text box.
- If you would like to create a new database of the duplicate records check the Create a new database of the duplicates check box.
- Click Duplicate.

EDITING THE TABLE STRUCTURE OF A DATABASE

In the Table Designer you can insert and delete fields or change the name, type or width of the fields in your list. Field names can be up to 10 characters in width. A field name should begin with a letter, a-z, and not contain any spaces or punctuation except for an underscore character, i.e. Shift+Dash. See *SmartAddresser 5 Field Descriptions* for a list of common *SmartAddresser 5* field names and information on required fields.

Follow the steps below to Edit the Table Design:

- From the Edit menu, choose Fields.

The Table Designer dialog box will appear.

Name	Type	Width	Decimal	Index	NULL
first	Character	55			
company	Character	50			
address	Character	60			
city	Character	30			
sal	Character	20			
middle	Character	20			
last	Character	30			
st	Character	2			
zip	Character	10			
crt	Character	4			
barcode	Character	14			
x	Character	1			
status_	Character	1			
erno_	Character	30			
type_	Character	1			
lacs_	Character	1			

To Insert a new field:

- Position the cursor in an existing field and click Insert.

A field named NEWFIELD will appear with a Character Type and a default Width of 10.

- Type the desired name of the field and press Tab.
- From the Type pop-up choose a data Type and press Tab.

Data Types are explained in detail below.

- Adjust the Width of the field as desired
- To add additional fields, repeat the steps above.

To Delete a field:

- Position the cursor in the field that you want to Delete.
- Press the Delete button.

The selected field will be removed and all the remaining fields shift up one position in the structure.



TIP!

A Before deleting a field, be sure that you have chosen the correct field name. This function will *permanently* delete the data in the field.

- To change the name, type or width of a field:
- Position your cursor in the field that you want to change.
- Make the desired changes.
- Click OK.
- Click Yes to make the Structure Changes Permanent.



TIP!

If the data type that you've chosen has a variable field width, a spinner appears under the Width heading. You can change the default value by clicking the spinner control or by entering a width for the field in the Width text box. If the data type is Numeric or Float, a spinner appears under the Dec heading. You can change the number of decimal places the field will have by using the spinner control or by typing a number in the Dec text box.

Data Types:

- **Character**

Use Character fields to store text information such as names, addresses, and numbers that will not be used in mathematical calculations, such as, prices, quantities, and sales amounts. Character fields have a default width of 10 and can be a maximum of 254 characters.

- **Numeric**

Numeric fields store numbers that will be used in mathematical calculations, such as, prices, quantities, and sales amounts. Numeric fields have a default width of 20 and can be a maximum of 20 digits.

- **Float**

Float fields specifically store scientific data. Float fields have a default width of 20 including an optional plus/minus sign and decimal place.

- **Date**

Date fields store dates in a date format. Date fields have a default width of 8: 2 digits for day, 2 for month and 4 for year. Dates will be displayed with a forward slash separator in the field.

- **DateTime**

DateTime fields store values that are either dates or times, or both. DateTime values can contain both a date and a time, or only a date or only a time. The DateTime field has a width of 8.

In both Date and DateTime data types, the following rules apply:

{00:00:00AM} is equivalent to {12:00:00AM}, Midnight.

{00:00:00PM} is equivalent to {12:00:00PM}, Noon.

- **Logical**

Logical fields store matter of fact information about the record. *SmartAddresser 5* requires a, "T" for true and "F" for false. Logical fields are always 1 character in width.

- **Memo**

A Memo field is a reference to a block of data. The default width of a Memo field is 10. However, the actual size of a Memo field depends on the amount of data entered into it. Memo field sizes are limited only by the amount of available disk space.

- **General**

General fields store OLE objects. The default width of a General field is 10. However, the actual size of a General field depends on the amount of data entered into it. General field sizes are limited only by the amount of available disk space.

- **Picture**

The Picture field type exists for compatibility with FoxBase+® and is dimmed unless you open a database created in FoxBase+ that contains a picture.

- **Currency**

Currency fields store currency data. Use the Currency field type instead of Numeric for monetary values. If you specify more than four decimal places in a currency expression, *SmartAddresser 5* rounds to four places before evaluating the expression.

- **Integer**

Use the Integer field type for non-decimal numeric values where performance and table storage limitations are especially important. In tables, the integer field type is stored as a 4-byte binary value so it requires less memory than other numeric data types and, as a binary value, requires no ASCII conversion.

- **Double**

Use the Double field type instead of Numeric when you need more accuracy, a fixed amount of storage in your table, or true floating-point values.

Reordering the Table Structure:

You can permanently change the default order that the fields appear in the Table Designer dialog box. This will reorder the structure of the database and make it the List View Default.

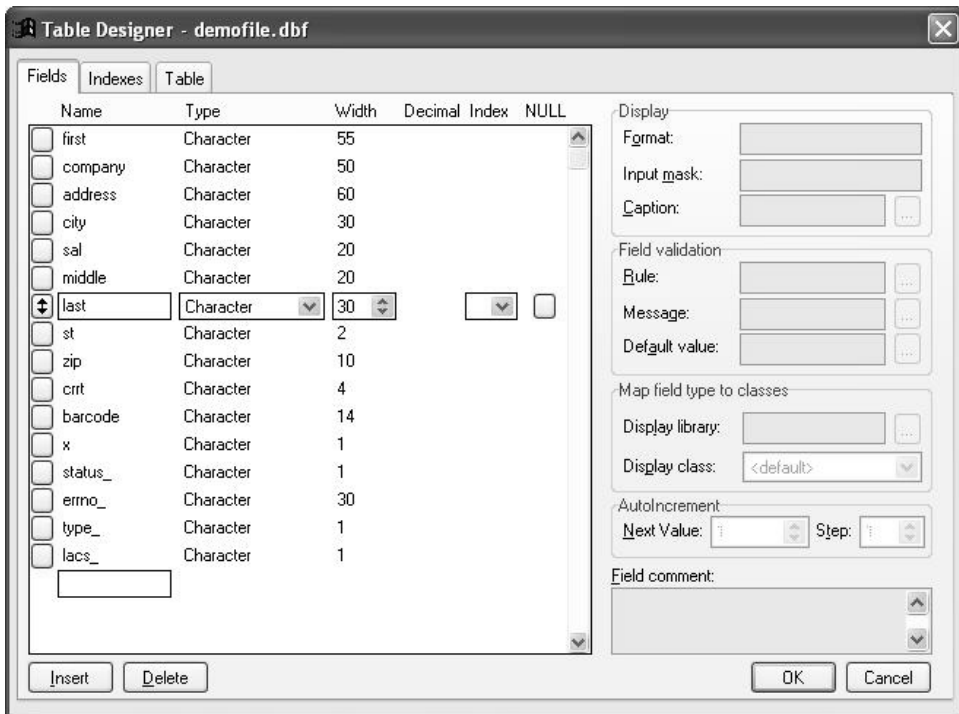


TIP!

Moving the fields around in the Table Designer will not affect your current View of the database. You must choose List View Default from the View menu to see your list in order based on the structure setup in the Table Designer.

Follow the steps below to reorder the fields in the Table Designer:

- In the Table Designer, click on the field that you want to reorder as shown below:



- Position your cursor in the gray box to the left of the field where the double arrow appears and click and drag the field into the desired order.



TIP!

When indexes are created in *SmartAddresser 5* they appear under the Index tab in the Table Designer. Indexes are created when you sort by a field in the list. For more information on Indexing and Sorting see [Sorting by Field Names](#).

FILLING DATA INTO A FIELD

The *SmartAddresser 5* Fill feature allows you to fill data into a specific field and scope of records. For instance, you may want to mail to the "Current Resident" because you do not have names in your list. You could use the Fill feature to fill the words "Current Resident" into the field named FIRST. You could also use the Fill feature to track specific information about your customers. For instance, if you knew that a group of customers in your list attended a trade show, you could use the Search Editor to search for them and then use the Fill feature to Fill a tracking field with TS for the specific Selection of records.

Follow the steps below to Fill data into a field:

- From the Special menu, choose Fill.

The Fill window will appear

- Select the field that you want to Fill data into from the Select a field from the list pop-up.
- Type the data that you want to Fill into the field into the Fill Field Name with text box.
- Click on the desired radio button that will best determine your scope for Filling records.

For information on scope radio buttons, see [Consistent Window Formats](#).

- Choose an Option from the Options radio buttons as described below:

Replace Content of Field

Replaces all existing text in the field.

Insert Before Value in Field

Inserts the data before the existing data in the field.

Append to Value in Field

Appends the data at the end of the data in the field.

- Click Fill.



Underscores act as spaces in the Fill Field Name with text box.

TIP!

FIND AND REPLACE

The Replace feature in *SmartAddresser 5* allows you to find specific data and Replace it with specific data. For example, you may want to expand a specific value in a field like TS to Trade Show or Ctr to Center. You could also use the Replace feature to remove unwanted data in a field. For example, if your list had exclamation points at the end of all of the company names in the field named COMPANY, you could find the exclamation point and replace it with nothing.

Follow the steps below to find and Replace data.

- From the Special menu, choose Replace.

The Replace window will appear.

The screenshot shows the 'Replace' dialog box with the following fields and options:

- Select a field from the list:** A dropdown menu showing 'First'.
- Find this value:** A text box with '(case sensitive)' next to it.
- Replace with:** A text box.
- Search Options:**
 - ☐ Record
 - ☐ From-To
 - ☐ Next
 - ☐ Rest
 - ☐ Marked
 - ☐ Deleted
 - ☒ Selection
 - ☐ All
- Start at:** A text box with '1'.
- Buttons:** 'Replace' and 'Close'.
- ☐ Include Deleted
- ☐ Auto Run
- ☐ Auto Close
- Help:** A question mark icon.

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- Select the field where you want to Replace data from the Select a field from the list pop-up.
- Type the data that you want to Find in the Find this Value text box.
- Type the data that you want to Replace in the Replace with text box.



If you want to Replace the data with nothing, leave the text box blank.

TIP!

- Click on the desired radio button that will best determine your scope to Replace data.

For information on scope radio buttons, see [Consistent Window Formats](#).

- Click Replace.



Underscores act as spaces in the Replace with text box!

TIP!

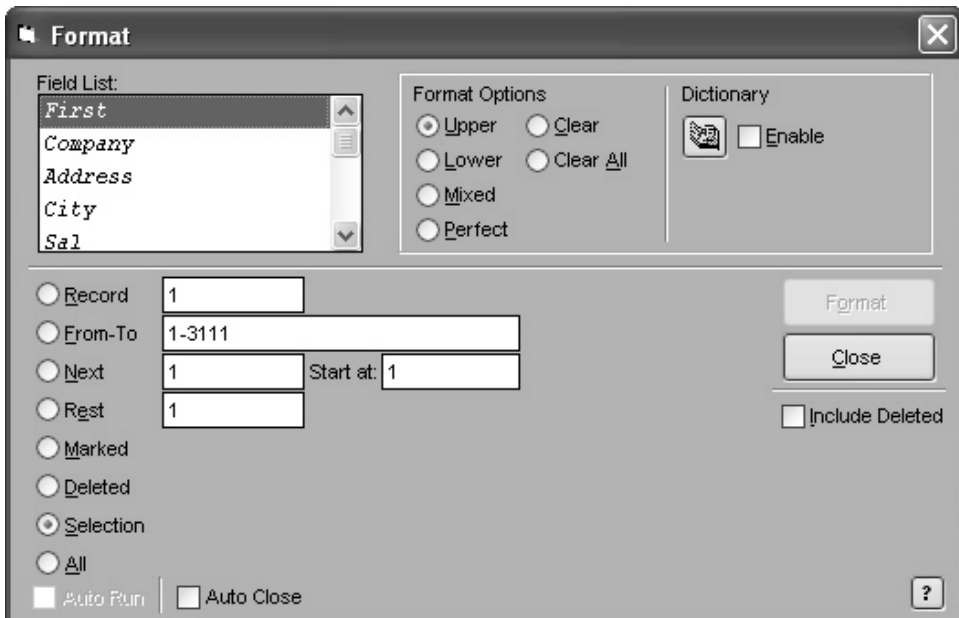
FORMATTING DATA

The Format feature in *SmartAddresser 5* allows you to modify the formatting of the data in your list primarily upper and lower case. The Format feature also includes a handy dictionary that can be used to build a cross-reference for common acronyms, misspellings and case adjustments from upper to lower. For example, if your list included the company name SmartSoft and you wanted to change the case in every occurrence to SmartSOFT, you could use the dictionary. In the Format window, you can change the format of all or selections of fields with one pass.

Follow the steps below to use the Format feature:

- From the Special menu, choose Format.

The Format window will appear.



- Select the field(s) that you want to format. To select a string of fields, hold the shift key down and click on each field until you finish with the fields that you want to select. To select more than one field randomly, hold the ctrl key down and click on the fields that you want to select.
- Select the Format Option that best suits your desired formatting as described below:

Upper - Formats all letters to upper case

Lower - Formats all letters to lower case

Mixed - Formats the first letter in each word to upper case

Perfect - Checks for vowel and consonant positioning to provide full capitalization for acronyms and proper capitalization for other words. For example, "Abc, Inc." would be changed to "ABC, Inc.", and "Mcbaine" would be changed to "McBaine".

Clear - Clears the format for the selected field(s).

Clear All - Resets all formatting.

Notice as formatting is selected; letters appear in the Field List next to the fields, such as, U for Upper and P for Perfect. This will help you identify which fields have been selected to format.

- Enable the Dictionary if desired.

See the [Format Dictionary](#) under [Properties](#) for more information.

- Click on the desired radio button that will best determine your scope of Formatting records.

For information on scope radio buttons, see [Consistent Window Formats](#).

- Click Format.

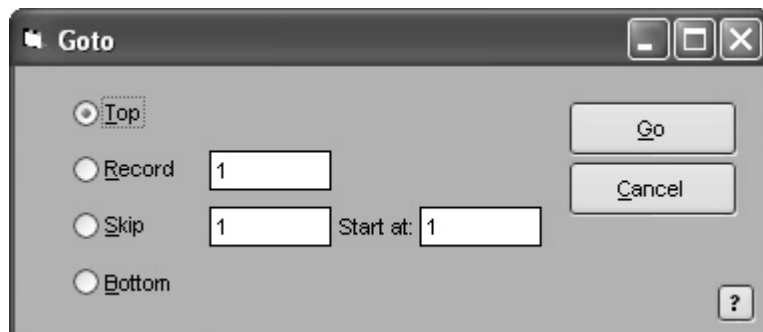
GO TO RECORD

The Go To Record feature allows you to jump to a specific record number in the list. Record numbers are created when the list is imported and do not change unless you Optimize the Database. When the list is Optimized, the indexes are rebuilt in ZIP code order and the record numbers are structured from the lowest ZIP code to the highest. If the list is not Optimized, then the record numbers will be maintained as originally imported. See [Optimizing the Database](#) for more information. The only other time that record numbers are changed in *SmartAddresser 5*, is when a User Defined multi-level sort is created, in both ascending and descending order. See [User Defined Sorting](#) for more information.

Follow the steps below to Go To a specific record:

- From the Select menu, choose Goto Record or press Ctrl+G on your keyboard.

The Go To window will appear.



- Choose the desired radio button as described below.

Top

Goes to the Top of the list.

Record

Goes to a specific record number in the list. Type the record number in the text box.

Skip

Goes to a specific record number in the list after skipping an Nth number of records. Type the Nth number in the first text box and the record number to start at in the second text box.

Bottom

Goes to the Bottom of the list.

- Click Go.

MARKING RECORDS

The Mark feature tags records with an "X" in the field named X that is created automatically by *SmartAddresser 5*. When the record is Marked it will appear in the color red in List View. The Mark feature is useful when you want to flag records that you want to process together. For example, you can create a custom search using the Search Editor and Mark the resulting records. Later you can use the Show feature to view the Marked records and process them separately from the rest of your list. For more information on the Search Editor, see Using the Search Editor.

Follow the steps below to Mark records:

To Mark one record at a time:

- Click on the record that you want to Mark.
- Click on the Mark Record/Clear Marked Record button in the toolbar.

The Marked record will be red in the list and an X will appear in the field named X.

To Mark a group of records:

- From the Edit menu, choose Mark.

The Mark window will appear:

- Click on the desired radio button that will best determine your scope for marking records. For information on scope radio buttons, see [Consistent Window Formats](#).
- Check the Include Deleted check box if you want to include records that are tagged for deletion.
- Check Clear Marked to clear all previously Marked records in the list if desired.
- Click Mark.

The Marked records will be red in the list and an X will appear in the field named X.

NTH SELECT

The Nth Select feature creates a selection of records from your database based on an Nth Number, Percentage, or Quantity. You could use the Nth Select feature when you want to prepare a test mailing so you can mail to part of the main list instead of the entire list. Using Nth Select for creating sample test mailing lists is a great money saver. It's a good idea to sort your list in ZIP code order, then select 10% of the whole list, making a test mailing list.

Follow the steps below to use the Nth Select feature.

- From the Select menu, choose Nth Select.

The Nth Select window will appear.

- Select the appropriate radio button as described below.

Nth Number

Selects every Nth number per the number that you enter. For example, if you enter "4", then the program will select every fourth record.

Percentage

Selects the percentage of the list that you enter in.

Quantity

Selects the quantity that you enter from the list. The number of records that you type in will be selected in increments from the list. For example, if you have 1,500 records in the list and you enter 500, every third record will be selected.

- Click on the desired radio buttons and check boxes that will best determine your scope for Nth Selecting records.

For information on scope radio buttons, see [Consistent Window Formats](#).

- Click Select.

PACKING THE DATABASE

Packing the database permanently removes all items that are tagged for deletion from the list. Use Pack Database to compact your database and rebuild the indexes. When the database is being compacted, the records that are tagged for deletion are removed, freeing up dead space.

Follow the steps below to Pack the Database:

- From the Edit menu choose Pack Database or click the Pack Database button



in the toolbar.

A warning will appear stating how many records are tagged for deletion and asking if you want to make a backup of the records. If you click Yes, a Save As dialog box will appear. A final warning will appear letting you know that the records will be permanently deleted from the list.

PARSING THE FIRST AND CITY FIELDS

SmartAddresser 5's Parse feature separates components when they are in the same field for the name and for the city, state, and zip. For example, the feature will separate the salutation, first name, middle name and last name into individual fields in the database.

Follow the steps below to use the Parse feature.

- From the Special menu, choose Parse, Name or City, St, and Zip.

The Parse window will appear. In this example, it's the Parse Name window.

- Click on the desired radio button that will best determine your scope for parsing.

For information on scope radio buttons, see [Consistent Window Formats](#).

- Click Parse.



TIP!

If the data in the name or city field is not parsed when the list is opened and all of the necessary fields do not exist, the program will prompt you to add the required fields before parsing can continue. For example, if you would like to Parse the name data and the data includes sal, first, middle and last in the field named FIRST, then the other fields will need to be added before the Parse process can continue. A Missing Fields window will appear in this case and you can simply click OK to add the missing field(s) to your list.

PARSING THE PHONE FIELDS

The Parse Phone feature allows you to Format the phone fields. The phone information must be stored in the *SmartAddresser 5* field(s) named PHONE1, PHONE2 or PHONE3 in order for the program to locate and format the information. There are many ways to

format a phone number and extension, and you can choose the one that best suits your needs as shown in the window below:

The **Phone Format** dialog box contains the following elements:

- Phone Number Format:**
 - ☒ (###) ###-####
 - ☐ ### ### ####
 - ☐ ###-###-####
 - ☐ #####
 - ☐ #####-####
 - ☐ ### ###-####
 - ☐ (###) ###-####
- Phone Extension Format:**
 - ☒ x####
 - ☐ ####
 - ☐ EXT. ####
 - ☐ x####
- Record** (selected): 3111
- From-To**: 3111-3111
- Next**: 1 **Start at**: 3111
- Rest**: 3111
- Marked**: ☐
- Deleted**: ☐
- Selection** (selected): ☒
- All**: ☐
- Auto Run**: ☐ **Auto Close**: ☐
- Buttons**: OK, Close
- Include Deleted**: ☐
- Help**: ?

Follow the steps below to Format a PHONE field:

- From the Special menu choose Parse, Phone.
- Select the desired formatting radio buttons.
- Click on the desired radio button that will best determine your scope parsing the phone field(s).

For information on scope radio buttons, see Consistent Window Formats.

- Click OK.

RECALLING DELETED RECORDS

When records have been tagged for deletion they still remain in the database until you choose to Pack the Database. See [Packing the Database](#) for more information. If you decide that you want to make the Deleted records active in your list again, you will want to use the Recall feature.

Follow the steps below to Recall a record that has been tagged for deletion:

- From the Edit menu, choose Recall.

The Recall window will appear.

- Click on the desired radio button that will best determine your scope of recalling.

For information on scope radio buttons, see [Consistent Window Formats](#).

- Click Recall.



You can Recall individual records in List View by clicking on the black bar to the left of the record or by clicking on the Delete/Recall button in the main tool bar.

TIP!

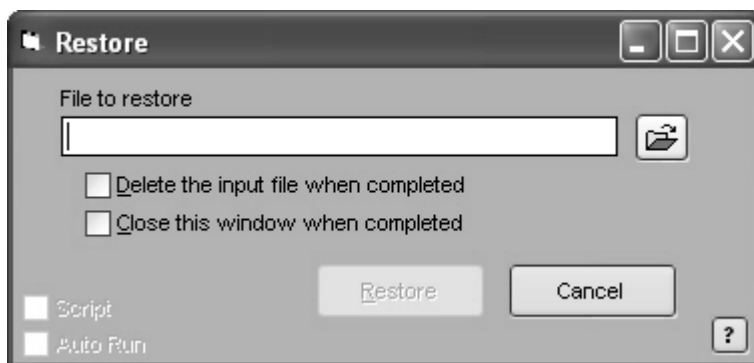
RESTORING DATA

The Restore feature in *SmartAddresser 5* decompresses any zipped file. Restore will extract the data in a zipped file to the same location as the .zip file. Once the zipped file is restored, you can open it in *SmartAddresser 5*.

Follow the steps below to Restore a file:

- From the File menu, choose Restore.

The Restore window will appear.



- Click the Open button to select the file you want to decompress.
- Check the "Delete the input file when completed" option if desired.
- Click Restore.

An Archives window will appear where you can select the file or files to be opened in SmartAddresser 5. The file must be in a DBF format to be opened from this window. If your file is not in a DBF format, refer to [Opening a List](#) for instructions on opening it in SmartAddresser 5.

REVERSING DELETED RECORDS

Reversed Deleted recalls records that are tagged for deletion and tags records that are not tagged for deletion, essentially "reversing" the entire database.

Follow the steps below to Reverse Deleted records:

- From the Edit menu, choose Reverse Deleted.

The Reverse Deleted window will appear.

Reverse Deleted

☐ Record: 1
☐ From-To: 1-3111
☐ Next: 1 Start at: 1
☐ Rest: 1
☐ Marked
☐ Deleted
☒ Selection
☐ All

Reverse Close

☒ Include Deleted

☐ Auto Run ☐ Auto Close

?

- Click on the desired radio button that will best determine your scope of reversing deleted records.

For information on scope radio buttons, see [Consistent Window Formats](#).

- Click Reverse.

SHOWING THE DATA

By default, *SmartAddresser 5* displays your data in what we call a List View format and displays all of the records. This basically means that the data will be displayed in a spreadsheet format on your screen. You can view sets of records in the program using the Show pop-up located in the interface bar at the top of the List View window, as shown below, or by selecting Show from the Select menu.

<u>D</u> eliverable	Alt+D
Deliverable - DPV Confirmed...	▶
<u>U</u> ndeliverable	
M <u>u</u> lti Matched	
N <u>C</u> OALink Matches	
NCOALink Matches...	▶
<u>N</u> ot Attempted	
Not <u>Z</u> IP+4 Coded	
<u>I</u> nvalid ZIP Codes	
<u>M</u> arked	Alt+M
D <u>e</u> leted	
M <u>a</u> rked and Deleted	
<u>B</u> ackground	Alt+B

Show Drop-down Menu

When you Show a set of records, *SmartAddresser 5* puts the balance of your data in the background and does not include it in various processes throughout the program. For example, *SmartAddresser 5's* Presort will only process records Showing on your screen, and, when you are Interacting with the USPS Database, only the records that are Showing will be used in batch interaction.

If you wanted to use only deliverable records in a Presort, you would choose Show>Deliverable from the Show drop-down. Alternatively, if you wanted to perform a non-automation Presort on both your Multi-matched and Undeliverable mail, you would choose Show, Deliverable and then choose Show, Background prior to Presort. The Export feature also saves only records that are showing on the screen.

When you use the Show feature, *SmartAddresser 5* displays the count of the Selection in red at the bottom of the window. When you Show all of the records or are in default List View, the program will display the total record count in black.

When you use the Show feature, the data becomes a Selection of records. To process the Selection in many of the features in *SmartAddresser 5*, you will choose the Selection scope radio button. See Consistent Window Formats for more information on scope radio buttons.

The groups of data that can be displayed using the Show pop-up are explained below:

- **All Records** - Shows all records in your list.

- **Deliverable** - Shows only Deliverable records in the list. Includes only records that have been assigned a valid ZIP+4 and barcode and achieved a "V" in the STATUS_ field during Validation.
 - **Deliverable – DPV Confirmed...** - Shows records that were DPV confirmed. Includes those records that were found in the Delivery Point Validation Database provided by the USPS.
 - **Undeliverable** - Shows only Undeliverable records in the list. Includes only records that did not get assigned a valid ZIP+4 and barcode and achieved an "N" in the STATUS_ field during Validation.
 - **Multi-matched** - Shows only Multi-matched records in the list. Includes only records where the program found multiple address matches and achieved an "M" in the STATUS_ field during Validation.
 - **Not Attempted** - Shows only records that have not been Validated. This is useful when you are adding new records to an existing list and you only want to Validate the new records as the other records have already been Validated.
 - **Not ZIP+4 Coded** - Shows only records that did not receive a valid ZIP+4 and barcode, as well as any multi-matched, invalid zip code, and unattempted records. Use this option to see *all* invalid records in your list with one click.
 - **Invalid ZIP Codes** - Shows only records that do not have a valid 5-digit ZIP code. All ZIP codes in the list are compared to the US ZIP database during processing. If the ZIP code does not exist in the US ZIP database the ZIP is invalid.
 - **Marked** - Shows only records that include an "X" in the field named X. For information on Marked records see the Marking Records topic.
 - **Deleted** - Shows only records that are tagged for deletion. For information on deleting records see the Deleting Records topic.
 - **Marked and Deleted** - Shows only records that include an "X" in the field named X and are tagged for deletion.
 - **Background** - Shows the Background of the existing data selection.
-

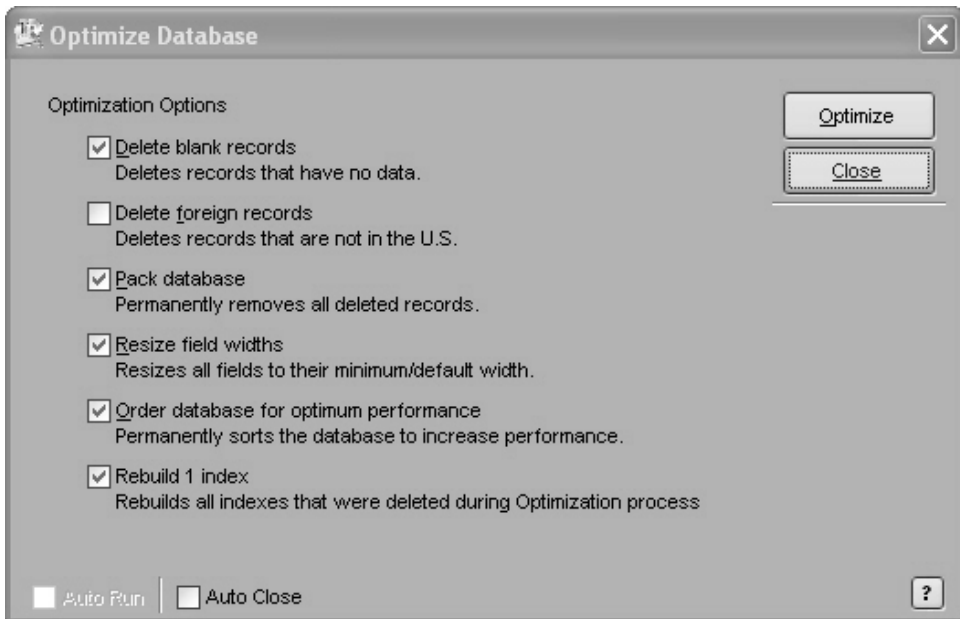
CASS CERTIFICATION AND OPTIMIZATION

OPTIMIZING THE DATABASE

Optimizing your *SmartAddresser 5* Database will significantly enhance the speed of processing. With *SmartAddresser 5*, you can determine the extent of optimization with check boxes.

- From the Special menu, choose Optimize Database.

The Optimize Database window will appear.



- Determine the extent of optimization by checking or unchecking each check box as listed below:

Delete blank records

* Searches the database for blank records and tags the record for deletion.

Delete foreign records

* Looks in the ZIP field and searches for any ZIP code that begins with a letter and tags the record for deletion.

Pack database

* Permanently removes all records that have been tagged for deletion from the database.

Resize field widths

* Analyzes the data in each field and determines the longest value then reduces each field length to the minimum size necessary to hold the respective information. Also resizes any field that has a required length to the required width. For example, it resizes the ZIP field to a width of 10.

Order database for optimum performance

* Permanently sorts the database by 5-digit ZIP code, city and address to increase performance during Validation and Presort.

Rebuild # indexes

* *SmartAddresser 5* creates indexes during processing. The indexes are stored so that they do not have to be recreated each time you repeat a process. For instance, if you were to choose By Company from the Sort menu, *SmartAddresser 5* would create an index for sorting your list by company. All indexes are deleted during optimization. If you would like the program to rebuild the indexes that you have already created during processing check this box.

- Click Optimize.

*For more information on deleting records or tagging records for deletion see **Deleting Records**.*

VALIDATING THE DATA

SmartAddresser 5 includes a unique style of record validation that allows the user to set up and save the validation settings with check boxes. The check boxes are set up in three categories; Integrity, Personalize and Output. This great feature provides the user with ultimate control over the outcome of their validation process. At Datatech SmartSoft our goal is to meet all the needs of our customers. Some users may only need to add the ZIP, + 4, and barcode to their data. Other users may need to add county data or preserve the original address data.

During validation, the program will look in up to ten address fields for data, beginning in the ADDRESS field, and will continue checking ADDRESS2 through ADDRESS10 until it finds a valid address match. When the program finds a match in any of the aforementioned fields, the validated address is swapped with the data in the ADDRESS field. If an apartment, suite or building number is required to validate an address, the

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program will search the address fields to the right of the field where the data is located and combine it with the data in the address field to complete validation.

When records are processed through validation, the program will determine if the record is Deliverable, Undeliverable, or Multi-matched. *SmartAddresser 5* will update a Deliverable record with a ZIP+4, Barcode, and CRRT information, along with any other information that you selected in the Validation setup window. Undeliverable and Multi-matched records will not be updated with any new information. The program identifies each of these using the STATUS_ field. Deliverable records will receive a "V" (for Valid) in the STATUS_ field, while Undeliverable and Multi-Matched records will receive an "N" (for Non-deliverable) and "M" (for Multi-Matched), respectively. An Undeliverable address is an address that *SmartAddresser 5* was unable to match in the USPS Database. A Multi-matched address is an address that was found in the USPS Database, but had more than one possible match. For example, if your input address was 100 Main St and the USPS Database included a 100 N Main St and a 100 S Main St but no address without a pre-direction, the address would be coded as a Multi-match, requiring more data to properly filter the street down to a unique match.

The program also outputs specific error and warning codes that can be used to determine what exactly took place during validation. The codes are stored in the ERRNO_ field in *SmartAddresser 5*. For a complete listing of the codes and what they mean, see [Error and Warning Codes](#).

Follow the steps below to Validate Records:

- From the Special menu, choose Validate Records or click the Validate Records button on the toolbar.

The Validate Records window will appear.

Check the desired boxes for Integrity, Personalize and Output settings as listed below:

Address Integrity Check Boxes

Don't Modify Input Address

* Protects the input address from any modification that may be necessary to code the address.

Preserve Original Company

* Creates a field in the database named OCOMPANY that stores the original company data after Validation.

Preserve Original Address

* Creates a field in the database named OADDRESS that stores the original address data after Validation.

Preserve Original City

* Creates a field in the database named OCITY that stores the original city data after validation.

Preserve Original State

* Creates a field in the database named OSTATE that stores the original state data after validation.

Preserve Original Zip

* Creates a field in the database named OZIPCODE that stores the original ZIP code data after validation.

Exceptions List

* Allows you to enter warning codes for records that you do not want *SmartAddresser 5* to correct. Thus, taking exception to the algorithm that the program will use to correct the record. Be aware that you will receive fewer validated records because the warning codes will restrict the coding process.

Delete Record If:

Missing Component

* Tags any record for deletion that has a blank ADDRESS field or has blank CITY, STATE, and ZIP fields.

Address Blank

* Tags any record for deletion that has a blank ADDRESS field.

Foreign

* Tags any record for deletion where the ZIP field data begins with a letter.

Undeliverable

* Tags any record for deletion that *SmartAddresser 5* determines as undeliverable during the validation process.

Multi-matched

* Tags any record for deletion that *SmartAddresser 5* determines as Multi-matched during the validation process.

Incomplete 5-Digit ZIP

* Tags any record for deletion that still does not have a complete 5-digit ZIP code after the validation process.

*For more information on deleting records or tagging records for deletion, see **Deleting Records**.*

Personalize Check Boxes

Expand Components:

Pre-direction

* Expands the Pre-direction in the ADDRESS field. For example: W to West.

Suffix

* Expands the Suffix in the ADDRESS field. For example: Ave to Avenue.

Post Direction

* Expands the Post Direction in the ADDRESS field. For example: SW to Southwest.

Secondary Name

* Expands the Secondary Name in the ADDRESS field. For example: Ste to Suite or Apt to Apartment.

State

* Expands the State in the ST field. For example: CA to California.

Abbreviate Address

* Abbreviates the address length to the number of characters that you specify. The address length must be between 25 and 40 characters.

Abbreviate City

* Uses the abbreviated city names in the USPS Database that are 13 characters in length.

Punctuate:

Pre-direction

* Punctuates the address Pre-direction. For example: "W" to "W."

Suffix

- * Punctuates the address Suffix. For example: "Ave" to "Ave."

Post Direction

- * Punctuates the address Post Direction. For example: "N" to "N."

Secondary Name

- * Punctuates the address Secondary Name. For example: "Ste" to "Ste."

State

- * Punctuates the State. For Example: "CA" to "CA."

Standardize Company Name

- * Uses the Company Name that is stored in the USPS Database.

Use Preferred City Name

- * Uses the USPS Database city name instead of an alternative to the city name that you have in your database. For example, it would use Los Angeles rather than West Hollywood because West Hollywood is not a city that the USPS recognizes in the USPS Database. When you check this box, a warning will appear that explains the action.

Output Check Boxes

Line of Travel Information

- * Creates a field named LOT_ and fills the field with the Line of Travel information. Check this box only if you plan to presort the database for a non-automation or flat size mailing.

Parsed Address Fields

- * Parses the address components and fills them into the appropriate fields. For example STREET_, PRE_, SUFFIX_, etc. See *SmartAddresser 5* Field Descriptions for more information on the fields that will be created.

County Code (FIPS)

- * Creates a field named COUNTYNO_ and fills the County Code into each deliverable record in the database.

County Name

* Creates a field named COUNTYNM_ and fills the County Name into each deliverable record in the database.

Congressional District

* Creates a field named CONGRESS_ and fills the two-digit Congressional District Code into each deliverable record in the database.

LACS Flag

* Adds a one-character LACS indicator field named, LACS_. *SmartAddresser* 5 will fill the letter "L" into this field for address records that are being converted to their 911 equivalent. After Validation is complete, search for records that contain an "L" in this field. There are many service bureaus, including the USPS that can convert these records to the new street address for you.

5-Digit ZIP Code

* Creates a field named ZIP5 and fills only the 5-digit ZIP Code into each deliverable record in the database.

+4 Code

* Creates a field named ZIP4 and fills only the +4 Code into each deliverable record in the database.

Delivery Point and Check Digit

* Creates a field named DPC and fills the Delivery Point and Check Digit into each deliverable record in the database.

Delivery Point

* Creates a field named DP and fills the Delivery Point into each deliverable record in the database.

Check Digit

* Creates a field named CHKDG and fills the Check Digit into each deliverable record in the database.

Area Code

* Creates a field named AREA_ and fills the Area Code into each deliverable record in the database.

Longitude/Latitude

- * Creates the fields named LONGITUDE_ and LATITUDE_ and fills the Longitude and Latitude into the fields, respectively.

Timezone

- * Creates a field named TIMEZONE_ and fills the Time Zone into each deliverable record in the database.

Finance Number

- * Creates a field named FINANCENO_ and fills the Finance Number into this field. A Finance Number is a code assigned to Postal Service facilities for purposes of collecting cost and statistical data, and for compiling revenue and expense data.

Address Type

- * Creates a field named TYPE_ and fills the Address Type into each deliverable record in the database.

Clear Existing +4 if not coded

- * Clears the +4 code in each record when the address does not CASS certify during Validation.

Clear Barcode Field if not coded

- * Clears the BARCODE field in each record when the address does not CASS certify during Validation.

Clear Existing CRRT if not coded

- * Clears the CRRT field in each record when the address does not CASS certify during Validation.

Record Status

- * Creates a field named STATUS_ that will contain a "V" if the record is determined to be Valid, an "M" if the record is determined to be Multi-matched and an "N" if the record is determined to be Non-deliverable. For information on trouble shooting Non-Deliverable and Multi-matched records see **Interacting with the USPS Database.**

Error and Warning Codes

- * Creates a field named ERRNO_ that will contain Warning Codes and Error Numbers that pertain to the records being processed.

- Select the desired Format. Select Upper for all upper case output or Mixed for upper/lower case output. This feature will format the COMPANY, ADDRESS, and CITY fields. If you would like to format other fields see **Formatting the Data**.
- Enable the Format Dictionary if desired. See the [Format Dictionary](#) for more information.

Once you have selected your settings in the Validate Records window you can save them for future lists that you would like to process the same way by following the steps below:

Under Saved Settings, do the following:

- Click the New button .
- Type in a name for your settings.
- Click the Save button .
- The next time you have a list that you want to Validate with the same settings, choose your Saved Setting from the pop-up menu.
- To view the statistics of your validation while processing, select the Show Stats check box under Misc.
- To automatically close the Validate Records window when the process is complete, select the Auto Close check box under Misc.
- Select either the Selection radio button, to Validate only the selection of records showing on your screen, or the All radio button to Validate all of the records in the list. The All and Selection radio buttons are located in the lower right corner of the Validate Records window.
- Click Validate.

LOOKING UP ADDRESSES

The Lookup feature allows you to type an address and then displays detailed information about the address. The address does not need to be in your database and

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the Lookup feature will not add or update the information in the database. Use the Lookup feature when you need to lookup a specific address and need to know if it is correct or need specific information about a given address.

Follow the steps below to use the Lookup window:

- From the Special menu, choose Lookup.

The Lookup window will appear.

Lookup

1. Enter Input Address

Company:

Urbanization:

Address:

City, St ZIP:

Address Label

2. Lookup Input ☒ ☒ Auto Lookup

3. Review Output

Urbanization: LOT Number:

Address: FIPS Code:

City, St ZIP: County Name:

Barcode: Congress:

DPBC Digits: LACS Flag: Rec Type:

Carrier Route: Errors/Warnings:

Time Zone: Area Code: Latitude: Longitude:

Number Pre Street Name Suffix Post Abrev Ste/Apt PMB PMB Number

- Type the address information into the Input Address text boxes.
- Press Tab or Enter after each entry.

If the Auto Lookup box is checked, the corrected information along with the barcode will display in the Address Label text Box automatically after you have left the city, st, zip text box. All detail about the address will be displayed for your review in the window as shown below.

Lookup

1. Enter Input Address

Company: Datatech SmartSoft

Urbanization:

Address: 5290 Overpass Rd, Ste 132

City, St ZIP: Santa Barbara, CA 93111

Address Label

Datatech SmartSoft
5290 OVERPASS RD STE 132
SANTA BARBARA CA 93111-2048
/931112048326/

2. Lookup Input ☒ ☒ Auto Lookup OK Clear

3. Review Output

Urbanization:

Address: 5290 OVERPASS RD STE 132

City, St ZIP: SANTA BARBARA CA 93111-2048

Barcode: /931112048326/

DPBC Digits: 93111 2048 326

Carrier Route: C024

LOT Number: 0075 A

FIPS Code: 083

County Name: SANTA BARBARA

Congress: 23

LACS Flag: Rec Type:

Errors/Warnings: A, I, T, A1

Time Zone: PST Area Code: 805 Latitude: 34.45950 Longitude: 119.8041

Number	Pre	Street Name	Suffix	Post	Abrev	Ste/Apt	PMB	PMB Number
5290		OVERPASS	RD		STE	132		



The information displayed in the Address Label can be copied into your Clipboard for use in any application by pressing Ctrl+C on your keyboard.

TIP!

INTERACTING WITH THE USPS DATABASE

SmartAddresser 5 hosts a valuable feature that will aid you in cleaning up your Undeliverable or Multi-matched records. You can also browse the USPS Database to locate specific addresses or ranges of addresses.

We suggest that you interact with the USPS Database to correct and update bad addresses in your list. This feature performs a real time query of the USPS Database as you type into the state, city, street and address ranges. When you choose to View the USPS Database from the View menu, the selected record will appear in the USPS Database window and automatically query the database to the correct state, city, street and address range. When you locate the desired information, you can simply click Update to update the address in the list. The Input Address is displayed in the window

and the program will automatically move to the next address in the database once the update is complete.

There are two ways to Interact with the USPS Database. You can View the USPS Database and the program will display each address in the USPS Database window. With this first method, each address will be displayed and can be updated from within the USPS Database window. The alternative is to choose Interact from the Special menu. Then, click on an address and press Ctrl+L on the keyboard (or from the Special menu, choose Validate this Record). In this case, deliverable addresses will be Validated and the USPS Database will not be displayed until an Undeliverable address is discovered.

Follow the steps below to Interact with the USPS Database and Update addresses in your list from within the USPS Database.

- Select an address in your list that you would like to correct or view in the USPS Database.
- You may want to Show your Undeliverable records before beginning this process if your goal is to work on this set of addresses and correct them. The USPS Database will move through each address in your selection when in Batch Mode as you Update. See Showing Data for more information on Showing selections of data.
- From the View menu, choose USPS Database.

The USPS Database window will appear. The window will automatically query to your Input Address location in the USPS Database. The Input Address is displayed in the window. If no database is opened, the windows will open to default values.

AccuMail Address Browse [X]

Your Input Address
 Ganem & Ganem
 6 Alexandur
 Buffalo NY

Replace With
 Alexander Ave
 Buffalo NY 14211

ZIP State City Street ALEXANDER

ZIP	State	City
14209NY	Buffalo	
14209NY	Buffalo	
14210NY	Buffalo	
14210NY	Buffalo	
14210NY	W Seneca	
14210NY	W Seneca	
14210NY	West Seneca	
14210NY	West Seneca	
14211NY	Buffalo	
14211NY	Buffalo	

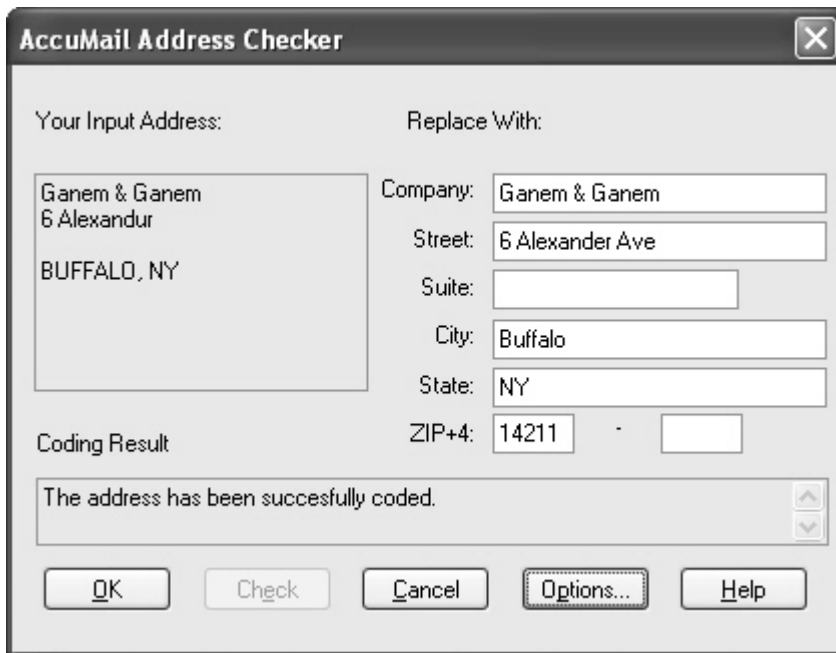
Street
A St
Academy Rd
Adams St
Alexander Ave
Alwin Pl
Antwerp St
Audrey Ln
B St
Bailey Ave
Bakos Blvd

Street Range	Parity	+4	Secondary Information
1 - 81	ODD	2715	
2 - 84	EVEN	2716	
83 - 199	ODD	2717	
86 - 198	EVEN	2718	
200 - 298	EVEN	27ND	
201 - 299	ODD	2742	

OK Cancel Help

- If you plan to use the USPS Database to correct multiple undeliverable addresses, check the Batch Mode check box in the USPS Database window.
- If you would like the program to update Firm and Unit information when the address is coded, check the appropriate check boxes.
- Once the correct address information is located, click **OK** to update the main database.

The Update Address window will appear:



The image shows a dialog box titled "AccuMail Address Checker". It has a close button (X) in the top right corner. The dialog is divided into two main sections: "Your Input Address:" and "Replace With:".

Your Input Address: This section contains a text area with the following text: "Ganem & Ganem", "6 Alexandur", and "BUFFALO, NY".

Replace With: This section contains several input fields:

- Company:** A text box containing "Ganem & Ganem".
- Street:** A text box containing "6 Alexander Ave".
- Suite:** An empty text box.
- City:** A text box containing "Buffalo".
- State:** A text box containing "NY".
- ZIP+4:** A text box containing "14211", followed by a hyphen and an empty text box.

Coding Result: Below the input fields, there is a text box containing the message: "The address has been succesfully coded." (Note the typo "succesfully").

Buttons: At the bottom of the dialog, there are five buttons: "OK", "Check", "Cancel", "Options...", and "Help".

- If the address information is correct, click **OK**.

If you had the Batch Mode box checked, the program will move on to the next address in your selection of records. If not, the window will close automatically.

- When you are completed with Batch Mode processing use the Close button



to return to List View.



TIP!

Once you have the correct street name, you do not have to locate the correct address. Simply click Update because the input street number will be used. If the matching address range is found, the record will code automatically.

DUPLICATE DETECTION

DUPLICATE DETECTION OVERVIEW

The *SmartAddresser 5* Show Duplicates window offers Basic duplicate detection and User Defined duplicate detection. The Basic duplicate detection process finds duplicates by matching specific predefined fields in the database. The User Defined duplicate detection feature allows you to control the method of duplicate detection. Either way, *SmartAddresser's* patented duplicate detection algorithm offers advanced features for you to choose from, such as Soundex and Exact Match. When duplicates are detected, they are tagged for deletion and dimmed in List View. Once detection is complete, you can review each duplicate, save them to disk to review later, or permanently remove them from the list by Packing the Database.



TIP!

We recommend that you Validate the records before Duplicate Detection. If your list is Validated before Duplicate Detection, the address will be standardized, providing more accurate detection.

- From the Select menu, choose Show Duplicates or click the Show Duplicates button from the main toolbar.

The Show Duplicates window will appear.



- Select either the **Basic** method or the **User Defined** tab to detect duplicates.

See these individual topics for full instructions on each.

- Check the desired check boxes in Show Duplicates window as explained below:

Review Duplicates

* Displays an independent Duplicate Records database on screen for you to review after duplicate detection is completed. See Reviewing Duplicates for more information.

Backup Duplicates

* Creates a *SmartAddresser 5* Database in the same directory as your main database that will store the duplicate records. The file name will include the name of your main database, the date, and the time that the Duplicate Records file was created.



TIP!

You cannot update the main database from the back up Duplicate Records file. If you do not check Review Duplicates, the main database is updated automatically when you press Start. When you check Review Duplicates, you must update the main database from the toolbar icon during the review process.

All Records

* If you have a selection of records on the screen prior to choosing Show Duplicates from the Select menu, the All Records check box will be available for you to check. If you are already showing all of the records prior to choosing Show Duplicates from the Select menu, the All Records check box will be dimmed.

Auto Run

* Auto Run is for Scripting and will only be available if you are running a script.

The A.K.A. Dictionary - Enable

* The A.K.A. Dictionary includes common match code references that aid in duplicate detection. For example, Bob matched with Robert. For instructions on adding or changing the A.K.A. Dictionary see [A.K.A. Dictionary](#).

- Select the Priority Record that you want to keep after duplicate detection as described below:

Original

* Keeps the original/oldest record in the list. The program determines this from the record number.

Newest

* Keeps the newest record in the list. The program determines this from the record number.

Most Information

* Keeps the record with the most information. The program determines this by adding up the total characters in all the fields in the database combined.

Least Information

* Keeps the record with the least information. The program determines this by adding up the total characters in all of the fields in the database combined.

User Defined

* Allows you to enter a FoxPro expression to define the Priority record. For example, if you would like to keep the record that has an account number in your field named ACCT, your expression would be; !empty(acct). See Commonly Used Expressions for more information on writing Expressions.

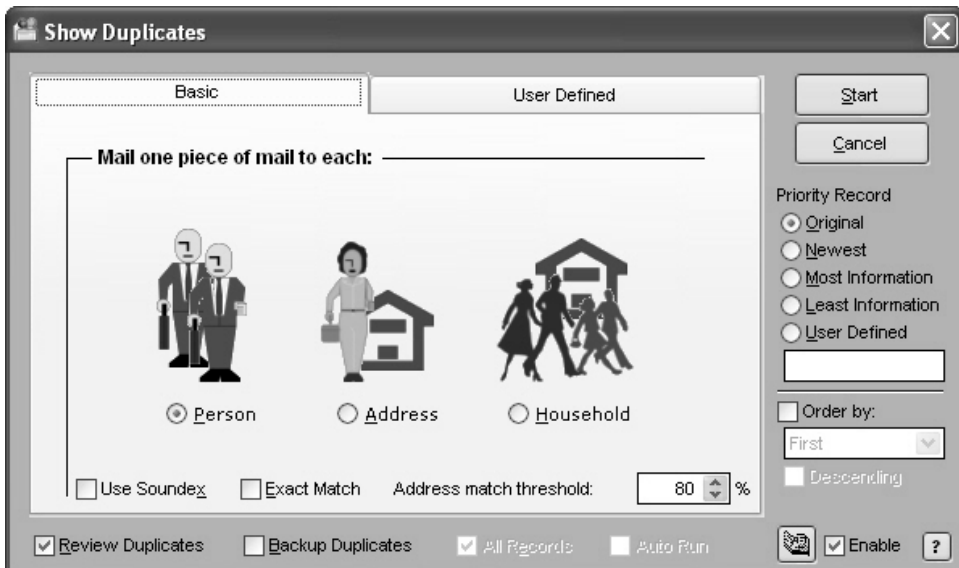
Order By:

* Allows you to select a field that you would like to use to determine which record is kept. For example, you could use a DATE type field that included information about when the record was last modified. You could choose to keep the oldest modification by checking Descending or the newest modification by not checking Descending. This would only work if you also chose the Original or Newest radio buttons accordingly.

- Click Start.

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Basic duplicate detection provides three options to facilitate duplicate detection: Person, Address, or Household. Each of the methods uses pre-assigned fields when creating a match. Follow the instructions in the Duplicate Detection topic to set up the main Duplicate Detection window and check the boxes that apply to you in the Basic section as described below:



By Person

* Compares the data in the fields FIRST, LAST, ADDRESS, and ZIP. It is highly recommended that the first and last name data either be stored in the fields FIRST and LAST or that you use the Auto Map feature to map your name data to these fields. You will also get better results from your duplicate detection if you Parse the name in advance.

By Address

* Compares the data in the fields COMPANY, ADDRESS and ZIP. If the company name is blank it is ignored. Select this option if you want only one record for each unique address or company/address in your database.

By Household

* Compares the data in the fields LAST, ADDRESS and ZIP to determine if there are two people with the same last name at the same address in the list.

Use Soundex

* Uses a unique algorithm to compare names that sound similar. For instance, Carrie and Cary.

Exact Match

* Will only detect duplicates that match exactly in each field.

Address Match Threshold

* Adjusts the percentage of characters in the ADDRESS field that the program will use to detect duplicates by searching the field from left to right. You may choose to adjust the Address Match Threshold if you are mailing to apartment complexes where all of the addresses are the same except for the apartment number.

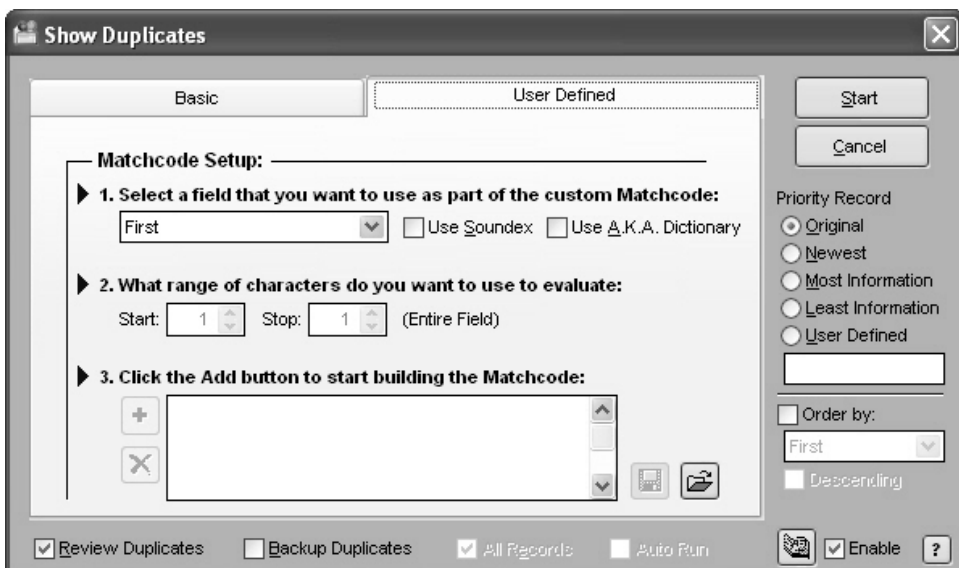
USER DEFINED DETECTION

The User Defined method of duplicate detection allows you to set up Match Codes on any field in the database. You can determine how far into the field you want to match. You can detect duplicates on as many fields as you would like and you can determine the order in which the fields are checked. You can also set up an A.K.A. Dictionary to allow for common matches like Bob to Robert or IBM to International Business Machines.

Follow the steps below to use User Defined Duplicate Detection:

- Click on the User Defined tab in the Show Duplicates window.

The User Defined Match Code Setup window will appear.



- Select a field that you want to use as part of the custom Match Code. All of the fields in your database will be available in the pop-up.
- If you want to use Soundex when checking this field for a match, check the Soundex check box.

Soundex will locate matches based on a unique algorithm and will compare data that sounds similar, such as, Carrie and Cary.

- Check Enable by the A.K.A. Dictionary if desired.
- Determine the range of characters within the field that you would like to use as a match and adjust the Start and Stop positions as desired. The program will report the percentage of the field being considered. By default, the program will use the entire field for matching. You can choose to Start in the middle of the field and Stop at the end or choose to only match the first five characters.
- Click the Add button to start building the Match Code.
- Repeat the above steps for each field that you would like to include in the User Defined Match Code.

. To delete a line from the Match Code, click the Delete button.

. To save the Match Code that you created, click the Disk button.

. To open an existing Match Code, click the Open button.

SEARCHING AND QUERYING DATA

BASIC SEARCHING

SmartAddresser 5's Quick Find feature will find data in specified fields, in real time. It appears at the top of the List View (just beneath the tool bar) with a drop-down menu for "Look In" and a text box for "Find". You can search from left to right, and the program starts looking for the data as soon as you start typing in the "Find" text box. If you check the "Contains" box, then the program will look for records that have specific data anywhere within a field.



The screenshot shows the 'Demofile' window of SmartAddresser 5. The 'Look in:' dropdown is set to 'Address', and the 'Find:' text box contains '100'. The 'Contains' checkbox is unchecked. The 'Show:' dropdown is set to 'All Records'. The table below shows the results of the search, with records whose addresses do not start with '100' filtered out.

	First	Company	Address	
▶	John	Foot Store	100 Olive Ave	Burbar
▶	Buster	Alex Aaron	1000 W 2nd Street	Alturas
▶	C	Terrys Towels Inc.	1000 Crag View Dr	Dunsm
▶	Chas	Snake Skin Eyeglasses Inc.	100 W Broadway Ste 150	Glende
▶	Christopher	Sow And Reap Shoe Service	100 S Main Street	Alturas
▶	David	First Advantage Mortgage	100 N Main Street	Alturas
▶	E	Articulate Sonar Desk Sets	100 W Broadway Ste 1040	Glende
▶	F	Alden Landings	100 N Cedar Street	Alturas
▶	Gary	Jurassic Vacation	100 W Broadway Ste 1280	Glende
▶	Il	Bethany Apts Office	100 N Howard Street	Alturas
▶	James	Carl Gilliland	100 E 1st Street	Alturas
▶	John	Foxtrot Farmers Shoes	100 W Broadway Ste 510	Glende
▶	Koscielski	Flying Dutchman Mail Boys	1000 Henderson Street	Alturas
▶		Quest Medical	100 W Fourth Street	Alturas
▶	Betsy	Geophysics And Earthworm Lab	100 Marion Street	Dunsm
▶	Jane	The Toy Shop	100 W Broadway Ste 500	Glende
▶	Mildred	Sink Or Swim Pools Inc.	100 6th Street	Dunsm
▶	Robbin	Sandy Bottoms And Rusty Shores Inc.	100 W Broadway Ste 970	Glende
▶	Montgomery Pamela	Grannys Ponyexpress Stuff	100 W Broadway Ste 650	Glende
▶	Anthony	Terrys Atomic Symbols Inc.	100 N Danhauser Street	Alturas

Notice the filtering of the address field with relation to the "find" text box. We have "100" typed in the Find box, and any address that does not start with 100 is filtered out of the selection in real time!

To use the quick find feature, perform the steps below:

- Select the field that you want to search from the Look In pop-up.
- Click Contains if desired.
- Type the data that you want to search for in the Find text box.

**TIP!**

Depending on the field type and whether or not you checked the Contains check box, the Quick Find will search the data differently. For example, when searching a Numeric type field without the Contains check box enabled, the Quick Find will search for the exact integer. If you type in "1", it will only find the number "1", not numbers that begin with "1", such as, "100".

ADVANCED SEARCHING

For more advanced searching, such as the ability to search multiple fields and criteria, use the Search Editor. The Search Editor allows you to define your search criteria. Search Filters can be as complex or simple as needed. There are over 100 Conditions to choose from when building your search criteria, and any field in your database can be included. See the Search Condition Table for detail on each condition. The Conditions differ depending on the field type. For instance, when searching in a Date/Time field, one of the conditions will offer searching between two dates. The Search Editor does not have a limit to the amount of criteria that you can search for in a single pass and Search Filters can be saved for later use. This topic provides the steps for building a search, saving a search and an example of how the Search Editor can be used to find specific data in a list.

Follow the steps below to use the Search Editor:

- From the Select menu, choose Search Editor or click the Search button from the main toolbar.

The Search Editor window will appear.

- Select the first field that you want to search in from the Fields list.
- Select the Condition that best meets your search criteria.
- If you chose a condition where you need to define the data such as, Begins With or Matches, a Look For text box will appear in the Search Editor window. There is no limit to the amount of data that can be typed into this box. The data can be copied and pasted into the Look For text box from another program.
- If the Look For text box appears, type in the data that you are searching for.

If you are building a Search Filter with multiple criteria, choose a Conjunction to connect the criteria. For example if you are searching for every record in Santa Barbara that is Deliverable, your Search Filter would read as follows:

City Begins with or Matches Santa Barbara AND

Status_ Exactly Matches V

To clear a line in the Search Filter, click the Remove Line button . To clear all the lines in the Search Filter, click the Reset Expression button .

- Review the check boxes in the Search Editor window and check those that apply as described below:

Is Case Sensitive

Checking this box will increase the speed of the search. You must type the exact case in the Look For text box or the records will not be found.

Before Search:

Clear Marked

Clears any previously marked records in the database before the search is executed. For more information on Marked records, see Marking Records.

Recall Deleted

Recalls any previously deleted records in the database before the search is executed. For more information on Deleting records, see Deleting Records.

After Search:

Mark Matches

Marks the matching records found. For more information on Marked records, see Marking Records.

Delete Matches

Deletes the matching records found. For more information on Deleting records, see Deleting Records.

Count Matches

Counts the records that are found during the search.

Close Window

Closes the Search Editor window when the search is completed.



The Count Matches check box and the Close Window check box cannot be checked simultaneously.

TIP!

- Click Search.

When the search is complete the matching records will be displayed.



TIP!

When the search is completed, the program will consider the output a Selection of records. This is handy when you want to use only the records from the search result during the next process in *SmartAddresser 5*. Use the Scope radio buttons available in most features to tell the program that you only want to process the Selection. Presort only processes the selection of records showing on the screen at the time of Presort.

To save the Search Filter, follow the steps below:

- Click the Save Filter button in the Search Editor window.
- Give the saved Search Filter a name in the Save As text box.

Do not browse to a new location - the Searches folder will be selected automatically!

- Click Save.

To open a saved Search Filter, follow the steps below:

- Click the Open Saved Filter button in the Search Editor window.
- Select the desired Search Filter in the Open dialog box.
- Click OK.

The Search Editor has many uses. Below is an example of how a Search Filter could be created in the Search Editor for data manipulation.

Let's assume you have a national periodical mailing list. You need to prepare a mailing for the Rural Route and PO Box addresses in your mailing list for a specific set of ZIP codes. You only want to mail to current subscribers, with addresses that have been CASS Certified. When you're finished with the Search Filter, the Search Editor window will appear as below:

Fields:

- Barcode
- X
- Status_
- Errno_
- Type_
- Lacs_
- Subscribe_

Conditions:

- Is False
- Is True

Search Filter:

(Address	*Begins With or Matches	RURAL-ROUTE	OR
Address	*Begins With or Matches	PO-BOX	)AND
Zip	*Matches Items in List	93401 93422 93446	AND
Subscribe_	*Is True		

Conjunction: AND ()

Before Search:

- ☐ Clear Marked
- ☐ Recall Deleted

After Search:

- ☐ Mark Matches
- ☐ Delete Matches

Display First: records

☐ Count Matches

☒ Close Window

☐ Auto Print

Search Close

By selecting the field ADDRESS, and then the condition "Begins With or Matches", you can then input RURAL ROUTE as your first search selection. When the conjunction "OR" is chosen, the filter moves to the next line, and you can repeat the process (Field>Condition>Data Input>Conjunction). Any time you combine multiple search lines, you will be using a conjunction to link them. The search editor is an extremely powerful tool, with almost infinite possibilities for querying your data. For assistance with using the Search Editor, or questions on how to optimize your querying strings, contact [SmartAddresser 5 Technical Support](#).

CREATING A ZIP CODES IN RADIUS DATABASE

The ZIP Codes in Radius feature in *SmartAddresser 5* will allow you to create an outpufile of ZIP codes within a specified amount of miles from an origin ZIP code. The ZIP Codes in Radius feature also allows you to enter Low and High radius ranges, which enables you to conduct a "Donut" search from any given zip code(s). In the ZIP Codes in Radius window, you can add unlimited ZIP Codes in Radius criteria.

Follow the steps below to create a ZIP Codes in Radius Database:

- From the Select menu, choose ZIP Codes in Radius.

The ZIP Codes in Radius window will appear.

ZIP Codes in Radius

1. Enter origin ZIP Code:

2. Enter Low Radius (Miles)

3. Enter High Radius (Miles)

4. Click to add the criteria to the list box (Repeat Steps 1-4 if desired)

ZIP Code	Low Radius	High Radius	ZIP's In Radius

5. Save the output file to:

Build **Cancel**

- Enter the origin ZIP Code in the text box provided.
- Enter the beginning distance in miles from the center of the origin ZIP Code into the Low Radius text box.
- Enter the ending distance in miles from the center of the origin ZIP Code into the High Radius text box.
- Click the Add button to add the criteria to the ZIP Codes in Radius Database.

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- Select the directory you want to Save the Output file to by clicking on the Save button.
- Click Build.

SmartAddresser 5 will automatically display the new ZIP Codes in Radius Database!

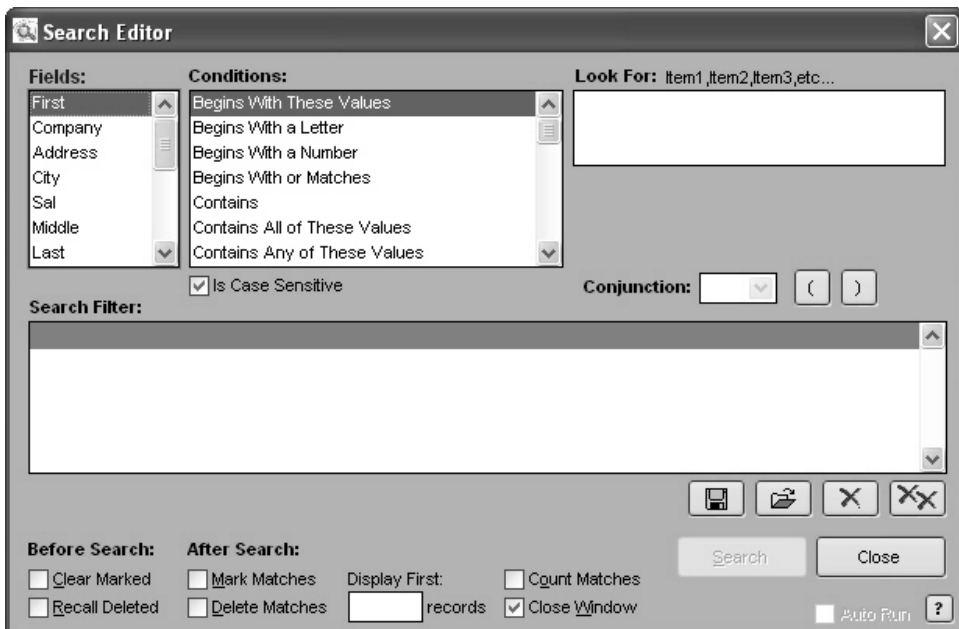
SEARCHING FOR RECORDS WITHIN A RADIUS

One of the Search Conditions offered in the Search Editor allows you to search in a radius of a specified ZIP Code. The search is conducted from the center of the 5-Digit ZIP code, according to USPS Geographical Latitude and Longitude.

Follow the Steps below search for records within a Radius:

- From the Select menu, choose Search Editor or click the Search button from the main toolbar.

The Search Editor window will appear.



- Select the ZIP field from the Fields list.
- Select the Condition, Within Radius of Nth Miles.

A Look For text box will appear in the Search Editor window that will demonstrate how to enter the data for the radius search.

Search Editor

Fields: Last, St, **Zip**, Crrt, Barcode, X, Status_

Conditions: Nth Position is a Letter, Nth Position is a Number, Nth Position is not a No. or Letter, Rhymes With, Sounds Similar, Where Character Occurs Nth Times, **Within Radius of Nth Miles**

Look For: ZIP,Distance,Maximum Records
93422, 500, 1000

Search Filter:

Field	Condition	Value
Zip	*Within Radius of Nth Miles	93422, 500, 1000

Before Search: ☐ Clear Marked ☐ Recall Deleted

After Search: ☐ Mark Matches ☐ Delete Matches

Display First: records ☐ Count Matches ☒ Close Window

- Type in the ZIP Code, distance in miles, and maximum number of records that you are searching for.



TIP!

The maximum number of records is not required unless you wish to find an Nth number of records closest to the criteria.

- Check the desired boxes at the bottom of the Search Editor window and then click Search.

You have now created a selection of records that will be displayed on your screen. See [Advanced Searching](#) for more information on the other features in the Search Editor window.

PREPARING THE MAIL

PRESORTING THE MAIL

Presorting the mail with *SmartAddresser 5* will allow you to take advantage of the lowest postage rates for the type of mail you've selected. *SmartAddresser 5's* Presort Setup window will assist you in defining your mailing specifications with easy-to-use calculators for determining the size, weight and container minimum and maximums. The window also performs real-time lookup of your local post office, DSCF, and DBMC. *SmartAddresser 5* creates a presort folder in the directory of your choice, which will hold all of the presort information, including tags, reports, and all of the records that were presorted. To save you time, presort settings can be saved so that you do not have to enter the settings for each type of job that you do.

Follow the steps below to Presort the mail:

- From the Sort menu, choose Presort Mail, or click on the Presort Mail button from the main toolbar.

The Presort Setup window will appear.

Presort Setup

Piece Setup:

Class: Standard Mail
Status: Profit
Size: Letter
Weight: Pounds 0.04810
Type: Machinable
Pay Type: Imprint
Print Barcodes
Surcharge

Container Setup:

Type: MM Trays
Minimum: 265 12.7465 lbs.
Maximum: 311 14.9591 lbs.
Pallets
Minimum: 1000
Maximum: 4000

☒ Include Non ZIP+4 Records
☒ Include Carrier Route Level
☐ Detached Address Labels

☐ News
☐ Create Firm Packages
☐ Contains Advertising
☐ In-county
☐ Ride-Along
% Pounds 0.00000

Mail Drop Setup:

ZIP+4: 53714
☒ Madison Carrier Annex VM 53714-2408
☒ SCF Madison VM 53714-9998
☐ BMC Chicago IL 60130-2296

Database and Presort Information:

Demofile.dbf

Save Presort Folder to:

...

Presort Folder name:

Presort Folder

Saved Settings:

...

☐ Auto Close ☐ Auto Print

Buttons: Presort, Close, Prepare in Reverse order

- Set up your Presort Parameters as described below:

Piece Setup

The Class pull-down

Class determines how your mail will be delivered. There are four options to choose from: First Class, Periodicals, Standard Mail, and Bound Printed Matter. Whichever class of mail you choose, you must hold a permit at your local post office for the selected class of mail. First Class Mail gets top priority. However, when Periodical and Standard Mail is prepared as automation compatible delivery point barcoded, the mail will be processed with the First Class Mail.

Whenever possible, you should choose to mail Standard Mail (A) automation instead of First Class automation. There are two main reasons:

- * First Class and Standard Mail (A) automation compatible is processed at the same time.

- * Standard Mail (A) can weigh up to 3.367 ounces before you are charged any pound rates, while First Class mail can only weigh up to one ounce. For everything over an ounce, you are charged additional postage.



TIP!

*Periodical Mail and Bound Printed Matter preparation requires additional setup to adhere to postal regulations. See **Preparing Periodical Mail** and **Preparing Bound Printed Matter Mail** for full instructions.*

The Status pull-down

Status determines what type of organization that the company is that the mailing is being prepared for. For Standard Mail, there are two options to choose from: profit or non-profit. If the mailing is being prepared for a non-profit organization, you should have special permission from the post office to mail at these lower rates. For Periodical Mail, there are two other options, Classroom and Science of Agriculture. Both must be pre-approved by the post office before the mailing is submitted.

The Size pull-down

Preparing the Mail

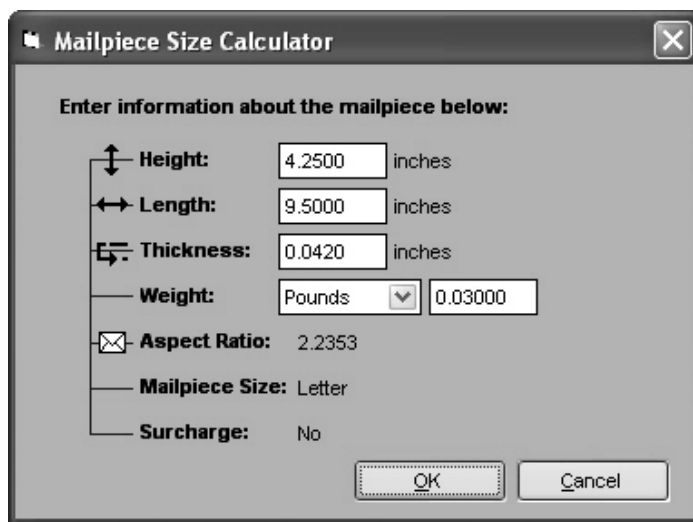
The size of your mail piece is determined by the length, width, and thickness. The class of mail you select will influence the choices you have when deciding on the size of your mail piece. The size of your mail piece is also determined by which way you apply the label or print the name and address on the mail piece. For example, a 6X9 envelope is considered a letter if the label is applied horizontally to the nine-inch width.

In *SmartAddresser 5*, you can determine if your mail piece is a letter, flat, or card by using the Size Calculator in the Presort Setup window.

Follow the steps below to calculate your mail piece size:

- Click on the Size Calculator  next to the Size pull-down.

The Mail Piece Size Calculator will appear:



The image shows a dialog box titled "Mailpiece Size Calculator". It contains several input fields and a "Calculate" button. The fields are: Height (4.2500 inches), Length (9.5000 inches), Thickness (0.0420 inches), Weight (Pounds, 0.03000), Aspect Ratio (2.2353), Mailpiece Size (Letter), and Surcharge (No). The "Calculate" button is highlighted with a dashed border.

Field	Value	Unit
Height	4.2500	inches
Length	9.5000	inches
Thickness	0.0420	inches
Weight	0.03000	Pounds
Aspect Ratio	2.2353	
Mailpiece Size	Letter	
Surcharge	No	

- Enter the Height of the mail piece.
- Enter the Length of the mail piece.
- Enter the Thickness of the mail piece.
- Click OK to update the Presort Setup window with the calculated size.

The program will determine the Size of the mail piece based on the information that you entered, and will update the Presort Setup window when you click OK. A check will be displayed next to the Size

Calculator indicating that the Size Calculator was used to determine the size of the mail piece.

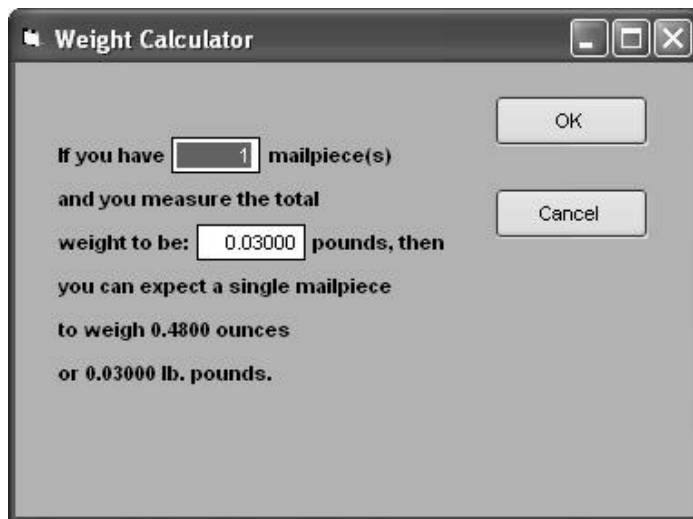
The Weight pull-down

The weight of your mail piece can affect your postage rates. It is important that the weight of a single piece is accurate to avoid problems when submitting your mail to the USPS. If you do not know the weight of a single piece, you can use the Weight Calculator to assist you if you have a total weight of any number of pieces.

Follow the steps below to calculate the weight of a single piece:

- Click on the Weight Calculator  next to the Weight pull-down.

The Weight Calculator window will appear



The Weight Calculator dialog box is a standard Windows-style window with a title bar that says "Weight Calculator". It contains two input fields: one for the number of mailpieces (containing the value "1") and another for the total weight in pounds (containing the value "0.03000"). The text inside the dialog reads: "If you have [1] mailpiece(s) and you measure the total weight to be: [0.03000] pounds, then you can expect a single mailpiece to weigh 0.4800 ounces or 0.03000 lb. pounds." There are "OK" and "Cancel" buttons on the right side of the dialog.

- Enter the total amount of pieces that you have weighed.
- Enter the collective weight of the total pieces.
- Click OK to update the Presort Setup window with the calculated weight.

The program will update the Presort Setup window when you click OK. A check will be displayed next to the Weight Calculator indicating that the Weight Calculator was used to determine the weight of a single piece.

The Type pull-down

There are three types of mail that can be processed through *SmartAddresser 5*: machinable, non-machinable, and manual. The type pull-down menu allows you to specify which type of mail you will be presorting. For a breakdown of each, see the notes below:

Machinable

Machinable mail is automation compatible mail with a barcode printed on the piece. Verify your particular mail piece's eligibility for automation rates with your local post office, or consult the [Domestic Mail Manual](#), published by the United States Postal Service for details.

Non-Machinable

Mail pieces that are of the correct aspect ratio and thickness to be processed through automation equipment, yet will not have a barcode printed on the piece, will be classified as non-machinable. Selecting Non-Machinable from the Type pull-down will provide the applicable nonautomation postage rates, and print tags with the "MACH" identifier required by the USPS.

Manual

Manual pieces are pieces that exceed the limitations set forth by the USPS for machinable mail. Typically these pieces will be too thick, or the aspect ratio will be too small, or an equally problematic issue for automation equipment. Selecting manual will give you the same nonautomation rates as Non-Machinable (in most cases), but will also print "MAN" on the container tags, required by the USPS.

The Print Barcodes Checkbox

The Print Barcodes checkbox is the final determination within *SmartAddresser 5* as to whether your mail will receive automation discounts or not. If you select Machinable in the Type pull-down, then you can enable the Print Barcodes option. If Non-machinable or manual is selected in the Type pull-down, then the checkbox will be dimmed.

Pay Type pull-down

The Pay Type pull-down allows you to select your payment method for the mailing. The available options are Imprint, Meter, or Stamps. *SmartAddresser 5* automatically checks the appropriate

payment box on the mailing statement that corresponds to your selection in the Pay Type pull-down menu.

Container Setup

The Type pull-down

The Type pull-down allows you to specify the tray size that you'll be using. The options are extensive in *SmartAddresser 55.0*, allowing you to choose from the following:

MM Trays

EMM Trays

Flat Trays

Sacks (White)

1' MM Trays Only

2' MM Trays Only

EMM Trays are two-foot letter trays that measure 21 3/4 inches long by 11 1/2 inches wide (inside bottom dimensions) by 6 1/8 inches high. These trays must be used for letter-size mail that does not fit in regular MM trays. Select the EMM Trays Only item if your mail piece size requires their use. If you used the Size Calculator, the program will automatically select EMM Trays if your mail piece size is calculated to require use of this type of tray. Refer to the applicable section of the [Domestic Mail Manual](#) for detailed container requirements for your class of mail.

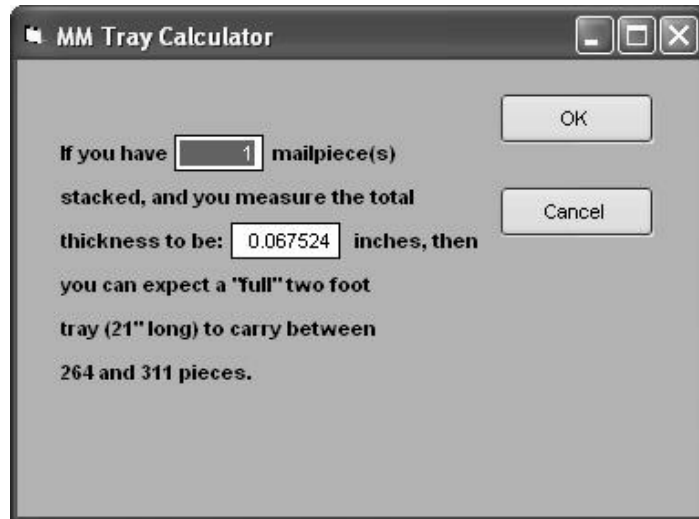
The Container Minimum and Maximum

Use the Tray Calculator  to calculate your tray minimum and maximum per postal regulations. The minimums and maximums vary dependent upon the size of your mail piece and the postal regulations for each class of mail. The Tray Calculator takes into consideration all of these factors, and will automatically update the Presort Setup window based on the information that you enter. You may also enter the Tray minimum and maximum manually. Standard and Periodical class flat size mail minimums and maximums (as well as container type) will be calculated automatically based on the weight of the mail piece per postal regulations. You may adjust the numbers manually, but caution must be exercised as to not adhere to the postal regulations for your class of mail.

Follow the steps below to use the Tray Calculator:

- Click on the Tray Calculator in the Presort Setup window.

The Tray Calculator will appear:



- Enter the total amount of pieces that you have measured, and the measurement in inches. The Tray Calculator will display the recommended tray minimum and maximum per the thickness.
- Click OK to update the Presort Setup window with the calculated tray minimum and maximum.

The program will then update the Presort Setup window. A check will be displayed next to the Tray Calculator indicating that the Tray Calculator was used to determine the minimum and maximum pieces per tray.

The Include Non ZIP+4 Records check box

Check the Include Non ZIP+4 Records check box when you want to include records that do not have a ZIP+4 or barcode assigned to them. When this box is checked, any records that have a valid 5-digit ZIP code, but do not have a +4 assigned to them, will be presorted for non-automation and will be included in the non-automation portion of the mailing statement (when applicable).

The Include Carrier Route Level check box

Check the Include Carrier Route Level check box when you want to sort the mail to the Carrier Route level. When this box is checked, you will receive the lowest possible postage rates per postal regulations. In some cases, this may create more containers than a non-carrier route based mailing.

*For information on the Periodical-specific checkboxes at the bottom of the mailpiece setup column, refer to **Preparing Periodical Mail**.*

The Mail Drop Setup

In the 5-Digit ZIP code text box type the 5-digit ZIP code for your local post office or the 5-digit ZIP code where your mailing permit is held. If you are unsure, contact the post office where you normally submit your mail and ask them for their ZIP code. As you type in the ZIP code into the text box, *SmartAddresser 5* will display your local post office name, SCF (Sectional Center Facility), and BMC (Bulk Mail Center). Check the box or boxes where you plan to drop the mail. The advantage of drop shipping mail at the BMC or SCF is lower postage rates and faster delivery of mail. Only some of the mail may qualify to be dropped at the SCF or BMC. *SmartAddresser 5* will determine the discounts, as the mail is presorted when the additional check boxes are checked. The only drawback for qualifying for these lower rates is that you are required to drive the mail to the facilities and drop off the qualifying pieces of mail. You must also obtain special permission from your local post office to do this. Most of the time, you will be able to pay for all of the mail at your local post office, then, drop the mail at the SCF and/or the BMC post offices. These other post offices could be many miles away from your location, and not worth the savings in postage. You must decide if it is worth it for you.

DDU Setup and Drop Shipping

If you receive carrier route rates in your mailing, you may qualify for additional, Destination Delivery Unit (DDU) discounts on the carrier route qualified mail. Pieces that are being entered at the delivery unit that serves the delivery address on the mail could qualify for DDU discounts. You can enter and save as many sets of zips for different DDU's as desired and choose them when you plan to drop at a given post office. For instructions on setting up the DDU Chart (including plant-verified drop shipments), see the topic Destination Delivery Unit (DDU) under **Carrier Route Mail Preparation**. For information on performing Drop Shipments on your mail, see **Preparing Drop Shipments**.

The Database and Presort Information - Save Presort to setup

When *SmartAddresser 5* presorts the mail, a presort folder is created to store the presort print files created during presort. This will allow you to open existing presorts rather than presorting again when you need to print. By default, *SmartAddresser 5* will save the Presort Folder to the directory the database you are sorting is stored in, and name the folder "Presort Folder". You can determine the name of this folder and where you would like this folder to be stored by following the steps below:

- Click on the Browse button to choose the location where you want the presort folder to be created.
- Type the desired name for the folder into the provided text box.
- Check the Overwrite check box to overwrite the existing presort folders.

The Overwrite check box will only appear when a folder already exists with the same name in the directory that you have selected.

The Saved Settings feature

You can save the settings that you have defined in the Presort Setup window for each type of mailing that you do. If you do many different jobs for different people with different settings, this will be extremely useful to you. Once you have defined the settings for a job, follow the steps below to save the settings:

- Click on the New button .
- Type a Setting Name into the provided text box. The name should be something to do with the job that you are performing. There is no limit to the amount of characters in this text box.
- Click the Save Current Settings button.

The next time you want to use the Saved Settings, simply choose it from the Saved Settings pull-down.

- To delete an existing Setting Name, click the Delete Settings Name button.

The Prepare in Reverse Order check box

Most Direct Imprint printers stack the mail from bottom to top as they release the material. This causes cumbersome collation during the tray loading process. The Prepare in Reverse Order check box will correct this problem by sorting the mail from the back of the tray to the front allowing the pieces to simply be picked up and placed in the tray.

- Once you have defined all of the settings in the Presort Setup window, click Presort.

*When the presort process is completed you will be ready to print the reports, tags and labels to take to the post office. See **Printing** for further instructions.*



TIP! Periodical Mail and Bound Printed Matter preparation requires additional setup to adhere to postal regulations. See **Preparing Periodical Mail** and **Preparing Bound Printed Matter Mail** for full instructions.

ADVANCED SORTATION MODULES

- There are many advance sortations modules added to SmartAddresser 5. These include:
- **Bound Printed Matter** – According to the USPS, “Bound Printed Matter is material that consists of advertising, promotional, directory, or editorial material that is securely bound (not loose-leaf binders), consists of sheets of which at least 90 percent are imprinted by a process other than handwriting or typewriting, contains no personal correspondence and is not stationery (such as pads of blank printed forms).” For more information go to: <http://www.usps.com/rates/bound-printed-matter-rates.htm>
- **Media Mail** – According to the USPS, “Media Mail® service is a cost efficient way to mail books, sound recordings, recorded video tapes, printed music, and recorded computer-readable media (such as CDs, DVDs, and diskettes). Media Mail can not contain advertising except for incidental announcements of books. The maximum weight for Media Mail is 70 lbs”. For more information go to: <http://www.usps.com/send/waystosendmail/senditwithintheus/mediamail.htm>
- **Library Mail** – According to the USPS, “Items on loan from or mailed between academic institutions, public libraries, museums, and other qualified organizations can be sent using Library Mail.” For more information about

Library Mail go to:

<http://www.usps.com/send/waystosendmail/senditwithintheus/libraryrate.htm>

- **Customized Market Mail** – According to the USPS, “The United States Postal Service® is changing the way businesses “*do mail*.” Customized *MarketMail*™ service is a new Standard Mail™ option that allows you to test your creativity and send a truly dimensional mail piece of any shape or design. So, you can empower your marketing message and reach your customers with unique formats that demonstrate your product and encourage responses.” For more information go to:
<http://www.usps.com/customizedmarketmail/welcome.htm>
- **Palletization** – The ability to prepare your mailings on Pallets. This feature is available for Containers or for Packages
- **Mail.dat™** – The industry standard **Mail.dat** file-based electronic exchange process provides a platform to support large mailers with complex mail preparation schemes.
- Multiple Drop Shipment for DDU, DSCF, DBMC and DADC (Periodicals)

PRINTING

PRINTING ADDRESS LABELS

SmartAddresser 5 is designed to allow for printing to all types of printers, including dot matrix, laser, direct impression, and inkjets with label formats designed for each. In the *SmartAddresser 5* Print Settings window, you can select the type of printer that you are printing to and *SmartAddresser 5* will automatically send the correct barcode syntax to the printer. The label formats are selectable from a pull-down menu in numeric/alpha order.

Most label templates contain the standard fields that are required for addressing, which are barcode, endorse, first, last, company, address, city, state and zip. Label Templates can be copied or renamed and can be edited directly from the Print Settings window. This will allow you to customize your templates as needed. See [Editing Label Templates](#) for more information.

If you need to start printing from where you left off, *SmartAddresser 5* sports a handy Look Up feature to find the exact record where you want to begin printing from. You can also select the scope of records that you want to print using the "Scope" Radio Buttons in the Print Settings window.

Follow the steps below to print the Address Labels. If you want to print Presorted Address Labels, you must be in the Print Presort window. If you are not, and you have already presorted the records, see [Opening an Existing Presort](#) for instructions.

To print labels in Presort Order, from the Print Presort window, click Labels. To print labels in List View Order, from the File menu choose Print while in the List View. The Print Settings window will appear:



In the Print Settings window, select the desired Output Format.

*The Disk File option will create an Output File that can be used to print the addresses in another program. See **Creating a Disk File** for more information. The Label Format option will allow you to print the addresses directly from the SmartAddresser 5 program per the Print Settings that you set up in the Print Settings window.*

Select the printer model or type from the Printer pull-down menu.

This printer pull-down only determines the type of barcode being sent to your printer, not the specific printer model. If your printer is capable of printing a standard true type font for a barcode, you can simply choose "Laserjet" as shown in the above image.

Select a Label Template from the Template pull-down menu.

There are many templates to choose from and each is designed for specific printer types and models, or existing Avery Label equivalent numbers. If you wish to Edit, Copy, or Rename an existing Label Template, or if you want to create a new template based on the selected Label Template, you can use the buttons in the Print Settings window as described below:



Opens the Label Designer for editing of the current template. Clicking this button will allow you to modify the content of your template, as well as resizing and reformatting the design. You can also set a default printer for use with this specific template.



Allows you to browse to a different location to open a Label Template. Use this feature when you want to Edit a template from another location and Save it to the SmartAddresser 5 5.0\Labels folder.



Creates and opens a copy of the selected Label Template. Use this feature when you want to save the original Label Template and create a second template for editing purposes.



Renames the selected Label Template.



Creates a new label template. See [Creating a New Label/Report Template](#) for more information.



You can enter a description for each Label Template that you use or create! Simply type the description into the Description text box and it will be automatically saved.

TIP!

Select the scope radio button to define the scope of records that you would like to print. For an explanation of each scope radio button, see [Consistent Window Formats](#).

Check the Pause Printing, Preview or Include Deleted check boxes if desired as described below:

Create PDF - Generates an Adobe Acrobat PDF format file in the Presort Directory (if printing from within a presort), named "eLabels.pdf", or the database location (if printing from List View), named . This file will have the same name as the database, but will have a pdf extension instead of dbf. For example, the "demofile.dbf" used in our tutorial would have a "demofile.pdf" PDF file in the database location.

Printer Prompt - Displays the Windows Printer dialog after clicking the Print button. This allows you to redirect the printed document to a driver other than the one specified within the label template. For more information on editing Label Templates, see [Editing Label Templates](#).

Preview - Displays a Preview of the data that will be sent to the printer.

Print Barcode - Prints the Barcode on the mail piece or label for automation mailings.

Pause Printing - Pauses the printer between Containers or Packages when printing presorted addresses, or even when data changes in a specified field.. When printing in List View order, printing can be paused using information in a specific field. See **Pause Printing** for more information.

Include Deleted - Will include Deleted records in the list if you are printing in List View order. This check box does not apply to Presorted records since Deleted records are not included in the Presort process.

If you are starting to print from a specific record in the list and you need to locate it, use the "Look in:" and "Find" text boxes to display the record in the displayed database. While typing your desired search criteria in the "Find:" text box, you will see the closest match shown in the Database pane.



The displayed database is the actual data in your print file and all of the fields can be viewed by using the available scroll bars.

TIP!

Follow the steps below to locate a specific record within the database pane:

Select a field to search in the "Look in:" text box.

Type the information that you are looking for into the Find text box.



Press Tab, or click the "Find Next Occurrence" button

SmartAddresser 5 will automatically find and select the first occurrence of the data entered.



To move to the next occurrence click the Find Next Occurrence button

Click Print.



PRINTING CONTAINER TAGS

Printing container tags is simple with *SmartAddresser 5*.

To print Container Tags you must have the Print Presort window open. This window will appear after the Presort process is complete. If you have presorted the mail, but closed the Print Presort window, see [Opening an Existing Presort](#) for instructions on returning to the Print Presort window.

Follow the steps below to print the Barcoded Container Tags and a Tag Summary Report:

From the Print Presort window, click the Print Tags button. You will be presented with the Container Tags window:

Container Tags

☒ Print Container Tag Summary Report

☒ Print Container Tags

Source:
Cut Sheet ☐ Plain Paper

Container Type:
Trays ☐ Print non-Barcoded Tags

Message:
DEMOFILE.DBF

Print Cancel

☐ Preview ☐ Create PDF ☐ Printer Prompt ☐ Auto Run

Check the Print Container Tag Summary Report checkbox.

The Tag Summary report is a single line listing of the tags that will actually print, including container quantity totals.

Check the Print Container Tags check box.

The Container Tags are required by the USPS for each tray or sack that is submitted for mailing.

From the Source pull-down menu, select Cut Sheet if you are printing to a laser printer or select Continuous if you are printing to a dot matrix printer.

If you're printing the container tags on plain paper and require guide lines to be printed for cutting, check the "Plain Paper" box. If you do not require guides to be printed, do not check the box.

From the Container Type pop-up, select Trays for letter size mailings, and Sacks for flat size mailings. For First Class flat size mailings, select Trays.

For printing Barcoded container tags, leave the "Print non-Barcoded Tags" box unchecked. For non-automation mailings that require non-barcoded container tags, check the box.

Click Print.

The Container Tag Summary Report will print first followed by the Container Tags. You will be prompted to switch paper stock before the Container Tags print.

You also have several other options available on the Container Tags window. They are noted below:

Preview - Checking the preview box and clicking the Print button will show you the preview pane, without actually sending any data to the default printer. This will allow you to view the tag content without physically printing it. You can use the preview control bar to then print the tags or switch between pages as desired.

Create PDF - Checking the Create PDF box will generate a file called "eTags.pdf" in your Presort Folder location. To easily access the presort directory, close the Tags window and go back to the Print Presort window. You'll see the line for the Presort Path is a link. Click the link to easily open the presort folder location, where you'll find the eTags.pdf file:



Printer Prompt - Checking Printer Prompt will allow you to send the Container Tags to a different printer than your default driver. *SmartAddresser 5 5.0* prints all reports and tags to the default printer automatically, but the Printer Prompt checkbox allows you to redirect the documents as they are printed.

EDITING LABEL AND REPORT TEMPLATES

SmartAddresser 5 offers a user friendly Label and Report Designer that can be used to design custom labels and reports in nearly any format. The Label and Report Designer makes it easy to select the information you need, and format it in a variety of ways to produce impressive labels and reports. The Label and Report Designers are object oriented, meaning that you can place objects such as text, pictures, fields, lines and rectangles in the bands of a Page Layout window. The objects can be manipulated and placed until the look of the label or report suits your needs. In addition, you can preview the template before it is printed to make sure that it is perfect.

You do not have to be a programmer to create custom labels and reports! However, there are many aspects to creating and customizing templates, and each has been given its own topic in the user's guide to make it easy for you to find what you are looking for. Each topic is explained below. See the individual topic for full instructions.

CREATING A NEW LABEL TEMPLATE

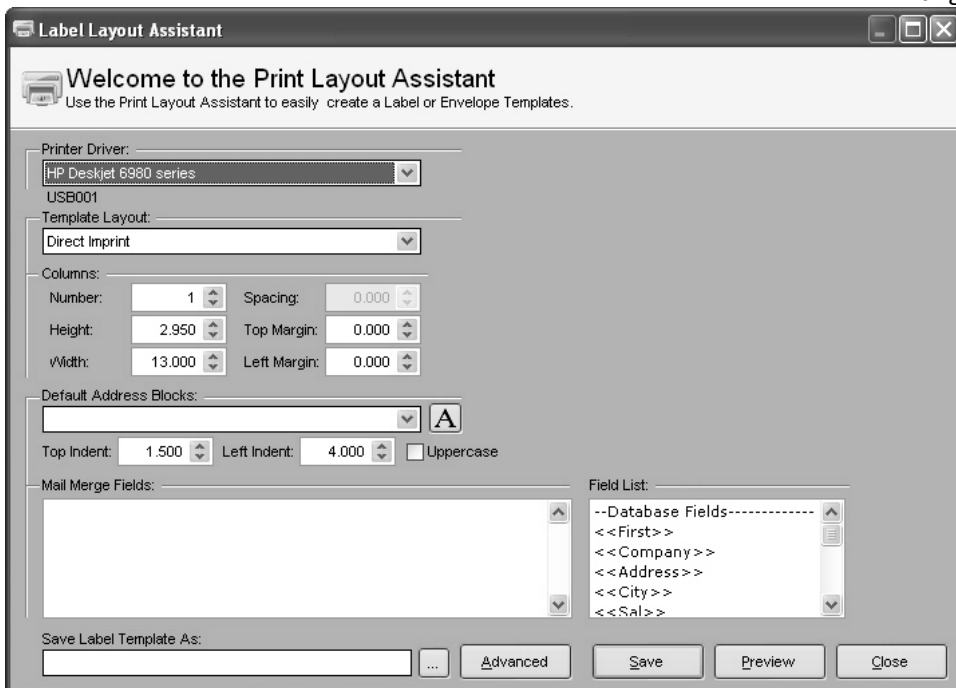
Creating a new label template in *SmartAddresser 5* has never been easier! For most users, the powerful Label Layout Assistant will allow you to create impressive labels in an easy-to-use interface. Define the default printer, the default Avery Label layout, and even modify the column properties and content placed on the label before ever entering the Label Designer. To get started using the Label Layout Assistant, you'll first need to know what basic format of label you are using. If you're not sure, the Template Layout will give you guidelines: the Avery Label equivalent number (which most standard labels have on the box), the number of columns, and size per label. For the purposes of this topic, we'll choose to create and modify a 5161 template, and create a custom address block.

CREATING THE TEMPLATE

To create your custom template, you'll first need to be at the Print Settings window. If you're not in the Print Settings window, click on the Labels button from the Print Presort window (if operating from within a presort), or File>Print>Labels if operating within the List View).



Click on the New button . You will be presented with the Label Layout Assistant window:



The Label Layout Assistant makes it easy to specify the exact dimensions of your label. Begin by selecting the desired printer that you'll be printing to.

From the "Printer Driver" pull-down menu, select your desired printer driver that is installed on the system.

The printer driver pull-down will list the actual drivers installed in the Windows Control Panel. If you do not see your printer listed, you'll need to install the recommended manufacturer printer driver for your printer model first.

Next, the appropriate Avery Label equivalent will be selected. If you don't know the Avery Label number, you can review the basic descriptions that are included with each template name. The description will tell you if it's a 1 Across (1 column) label, or 2 Across (2 column), etc., as well as the individual label size.

MODIFYING THE COLUMN DIMENSIONS

It's possible to adjust every aspect of the column alignment and size within the Label Layout assistant by using the easy-to-read Columns section, complete with a visual diagram that appears on the right when you set one of the column boxes to active, as shown in the image below:

Printer Driver: HP Deskjet 6980 series
USB001

Template Layout: 5161 (Avery): 2 Across (1" x 4")

Columns:

Number:	2	Spacing:	0.156
Height:	1.000	Top Margin:	0.500
Width:	4.000	Left Margin:	0.125

Default Address Blocks: [Dropdown] [A]

Top Indent: 0.000 Left Indent: 0.200 ☐ Uppercase

Using the column setting text boxes in conjunction with the diagram that appears to the right with any box active, it's very simple to set up the specific dimensions of your templates. Description of the settings are found below:

Number - Adjusts the number of columns on your label sheet.

Height - Adjusts the height of each individual label.

Width - Adjusts the width of each column. The setting is universal for all columns, so you only set the width once.

Spacing - Adjusts the spacing between columns, creating a "gutter" of unprintable area in case your label sheet has center dividers between the labels.

Top Margin - Adjusts the margin from the top of the label sheet to the top of the first row.

Left Margin - Adjusts the margin from the left side of the sheet to the left side of the first column.



TIP!

It's recommended to start with the left side of the Columns area to define the number of columns and individual label size, and then move to the right side with spacing, top margin, and left margin. Start small, making sure that your label dimensions are correct. After you're certain that your label measurements are accurate, you can then adjust the formatting of the sheet as a whole. This will help avoid confusion with measurements that "don't add up" on your paper size.

From the "Template Layout" pull-down menu, select your desired label template format. For the purposes of this help guide, we're going to choose a standard 5161 template, which is the most common 1" x 4" 2 column label format.

After choosing your template, you'll notice the Columns section updates with the appropriate information. You can modify the settings as you see fit. The pre-created Avery Label equivalents that are generated by default, however, will already have the correct column settings.

DEFAULT ADDRESS BLOCK CREATION

Creating one of the standard address blocks within the Label Layout Assistant couldn't be easier. Choose your font, the pre-created address block of your choice, and that's all there is to it! You can even modify the information after it's placed into the Mail Merge Fields area to create a customized version of the default address blocks. Follow the instructions below to create a basic address block:

In the Default Address Blocks area, click on the Font button . The fonts window will appear.

If you desire a specific font, select it from the Font list. Choose the desired font style and size, and then click OK.

From the Default Address Blocks pull-down menu, choose your desired Address block. Descriptions of the address blocks are found below:

Basic Address Block - Creates a simple, 3-line address block with First and Last, Address, and City-St-Zip. Useful for non-barcoded First Class Single Piece Labels for a residential list.

Address Block with Company - Creates a 4-line address block with First and Last, Company, Address, and City-St-Zip. Useful for non-barcoded First Class Single Piece Labels for a commercial list.

Address Block with Endorsement - Creates a 5-line address block with Endorse, First and Last, Company, Address, and City-St-Zip. A standard non-automation label for many classes of mail.

Address Block with Barcode - Creates a 5-line address block with Barcode, First and Last, Company, Address, and City-St-Zip.

Address Block with Endorsement & Barcode - Creates a 6-line address block with Barcode, Endorse, First and Last, Company, Address, and City-St-Zip.

My Address Block - After modifying any address block settings, you can select this option to save it as the default "custom" address block, which can be recalled any time in the future by selecting My Address Block in the Label Layout Assistant.

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After selecting your default address block, you can also adjust the indent of the text on the label itself by using the "Top Indent" and "Left Indent" settings. Be aware that the settings are for the **upper left corner** of the address block, so you'll want to take into account a width of approximately four inches for the default address blocks at creation. On the standard 5161 layout, a small indentation of .2 inches on both top and left indent works quite well.

After selecting your address block and indent settings, your Mail Merge Fields area will resemble the following image (shown using the Address Block with Endorsement & Barcode setting):



That's all there is to it! Creating the address block for most standard labels is easy and efficient within the *SmartAddresser 5* Label Layout Assistant!

SAVING THE NEW TEMPLATE

After you've selected a template default, assigned the column dimensions, and chosen a default address block, the only thing left to do is save the template. Follow the instructions below to create your first customized label--you're almost done!

In the "Save Label Template As:" text box, type your desired label name. It is recommended to avoid using symbols in the template names other than the pound sign (#), underscore (_), or hyphen (-). **Using symbols other than those noted can create issues.** Specifically, things like a period in the template name (5162 8.5 X 11.5, for example, would save as "5162 8.lbx", stopping at the first period). Avoid using symbols in template names whenever possible, but spaces and alpha/numeric characters are perfectly fine.

For our sample 5161 template, we've named the file "Tutorial 5161" and we're ready to save!



Clicking the Save button at this point will save the template and return you to the Print Settings screen, where you'll automatically have your new template selected in the template pull-down menu.

You're now ready to print, congratulations!

You can also create custom content and use advanced features within the Label Layout Assistant. For information on customizing the address block with database or presort fields and custom text strings, see [**Advanced Label Layout Assistant Tutorial**](#).

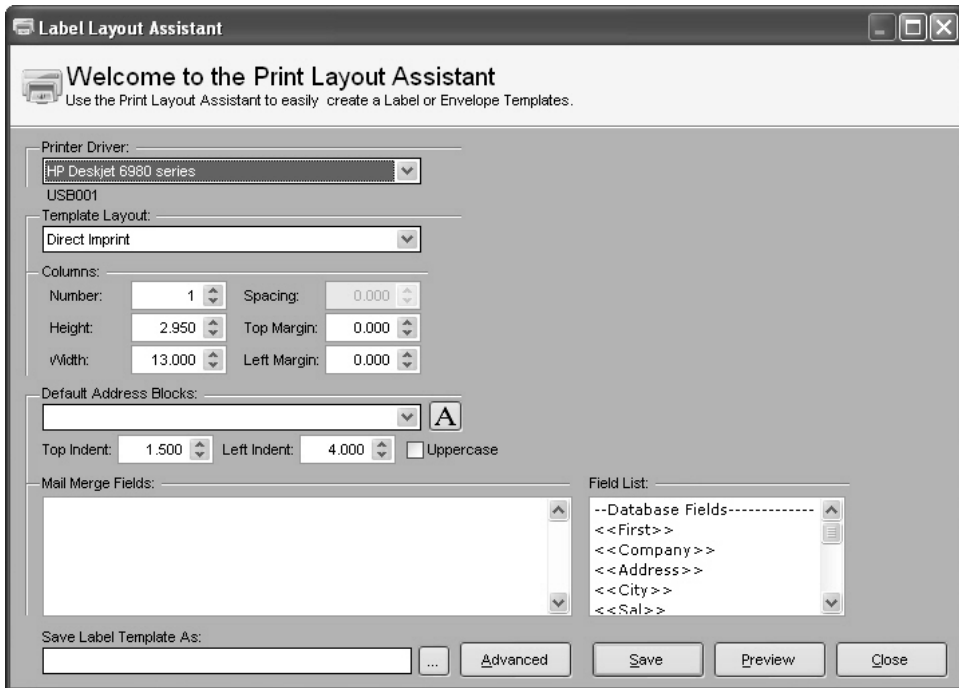
ADVANCED LABEL LAYOUT ASSISTANT TUTORIAL

The *SmartAddresser 5 Label Layout Assistant* is an incredibly powerful feature packed into an easy-to-use interface. If you haven't familiarized yourself with the Label Layout Assistant at this time, review the information found in the [**Creating a New Label Template**](#) topic. This covers template creation and naming procedures, as well as basic address block creation. This topic is designed for users who wish to use the *Label Layout Assistant* to create custom content on their labels without entering the *Label Designer* itself.

ADDING FIELDS THROUGH THE DRAG-AND-DROP INTERFACE

Adding fields and content through the Label Layout Assistant couldn't be easier! Follow the instructions below to begin creating custom content on your labels in *SmartAddresser 5*.

From the *Page Settings* window, click the *New* button . The *Label Layout Assistant* appears, as shown below.



Since you already know how to design a basic Avery 5161 label, we'll continue using the example found in [Creating a New Label Template](#). However, instead of using the *Default Address Blocks* area as in the previous topic, we are going to create a custom address block that includes both text and variable fields, much like the information found in [Adding and Combining Fields](#). If you've reviewed the information found within that topic, you'll realize just how simple and powerful the *Label Layout Assistant* is. The address block we're going to construct using the the *Assistant* will contain the following information:

Barcode

Tray Number, an asterisk, Bundle Number, and the Endorsement line

"Valued Customer" static text along with First and Last fields

"Or Current Resident" static text

Address field

City field, a static text comma, State field, and zip field

Whereas creating a template with all of that information could be a headache if writing it manually, the *Label Layout Assistant* makes it extremely simple! We'll start by focusing on the *Field List* and *Mail Merge Fields* areas.

MAIL MERGE FIELDS AREA

The *Mail Merge Fields* area is where the body of your new label will be constructed. Very basic syntax will appear here as you drag and drop fields from the *Field List* on the right.

Field List Area

The *Field List* area contains all of the current database's fields, as well as all *SmartAddresser 5* default presort field names. This allows you to create a template using not only your active file's fields, but also fields like "Endorse" and "Sequence" that wouldn't appear in your non-presorted database.

Creating the Address Block

The first thing we'll do at this point is construct the top line.

Since Barcode is the first desired line of our custom address block, we'll scroll through the *Field List* on the right until Barcode is showing.

Click on the <<Barcode>> field, and drag it from the *Field List* to the *Mail Merge Fields* area. Release the mouse button and <<Barcode>> appears in the *Mail Merge Fields* area, as shown:



That's all there is to it!

Since we've completed the process of creating the first line, we'll now press the enter key while the cursor is still positioned within the *Mail Merge Fields* area to create a new line.

The next line looks more complicated: tray number, an asterisk, bundle, and the endorsement information. Now is where you'll see how easy it is to use the *Label Layout Assistant!*

From the Field List, scroll down until you see the separator titled "--Presort Fields-----". The field we'll use is named "cont_id", found in the presort fields group. Click and drag cont_id from the Field List to the Mail Merge Fields as in the previous step.

You should now see a *Mail Merge Fields* area that resembles the following image:



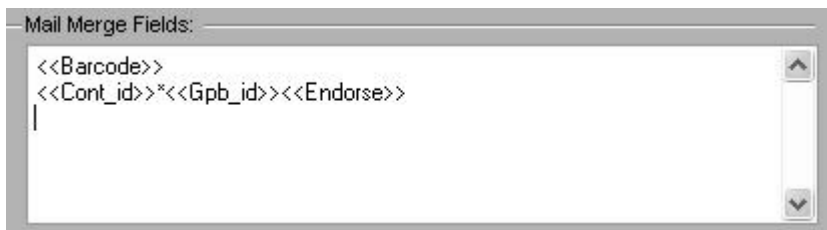
Next we'll add the static text asterisk after the `<<Cont_id>>` field.

Simply place your text cursor immediately after `<<Cont_id>>` and type an asterisk (*). That's all there is to it!

To create the rest of the endorsement line, you'll then drag the field *gpb_id* from the *Field List* to the *Mail Merge Fields* as in the previous steps.

Lastly, drag the field named *Endorse* from the *Field List* to the *Mail Merge Fields*.

Congratulations! You just created your first label line that contains both static text (asterisks that print every piece) as well as variable fields (*Cont_id*, *Gpb_id*, and *Endorse*). Your *Mail Merge Fields* should now appear as shown. If it does, you're on pace to become a label creation wizard in no time!



Now you see how simple it is. Drag fields from the *Field List* to the *Mail Merge Fields* for variable data, and simply type the text that you want for static text. Press **Enter** for a new line and repeat until your label is finished!

Press **Enter** to create the third line.

Type *Valued Customer* (with a space after it, since you don't want "Valued Customer" positioned right next to a name without a space) in the *Mail Merge Fields*.

Drag the field *First* from the *Field List* to the *Mail Merge Fields*.

Type a space, and then drag the field *Last* to the *Mail Merge Fields*. You should see a space between the static text and your first field, as shown:

Mail Merge Fields:

```
<<Barcode>>
<<Cont_id>>*<<Gpb_id>><<Endorse>>
Valued Customer <<First>> <<Last>>|
```

By now you've got the hang of it. We'll create the last lines quickly and easily, and then show the finished product before previewing the label.

Press **Enter** to create a new line.

Type *Or Current Resident*

Press **Enter** to create a new line.

Drag the *Address* field from the *Field List* to the *Mail Merge Fields*.

Press **Enter** to create a new line.

Drag the *City* field to the *Mail Merge Fields*.

Type a comma (,) and then a space.

Drag the *St* field to the *Mail Merge Fields*.

Type a space, and then drag the *Zip* field to the *Mail Merge Fields* area.

You're finished with the address block creation! Your *Mail Merge Fields* area should now resemble the following image:

Mail Merge Fields:

```
<<Barcode>>|
<<Cont_id>>*<<Gpb_id>><<Endorse>>
Valued Customer <<First>> <<Last>>
Or Current Resident
<<Address>>
<<City>> <<St>> <<Zip>>
```

The final step is to give the template a name using the *Save Label Template As* line. For the purposes of this tutorial, we'll call it "5161 Tutorial".

Type your desired label template name in the *Save Label Template As* line.

Click **Preview**.

That's all there is to it! Here is our completed template using the instructions found in this tutorial:



Close the Preview and click the **Save** button to return to the *Print Settings* window.

You'll see your newly created template in the *Template* pulldown.

You're ready to print, and congratulations on creating your first fully customized label template using *SmartAddresser 5's* powerful *Label Layout Assistant*!!

PAGE LAYOUT AND PAGE SETUP

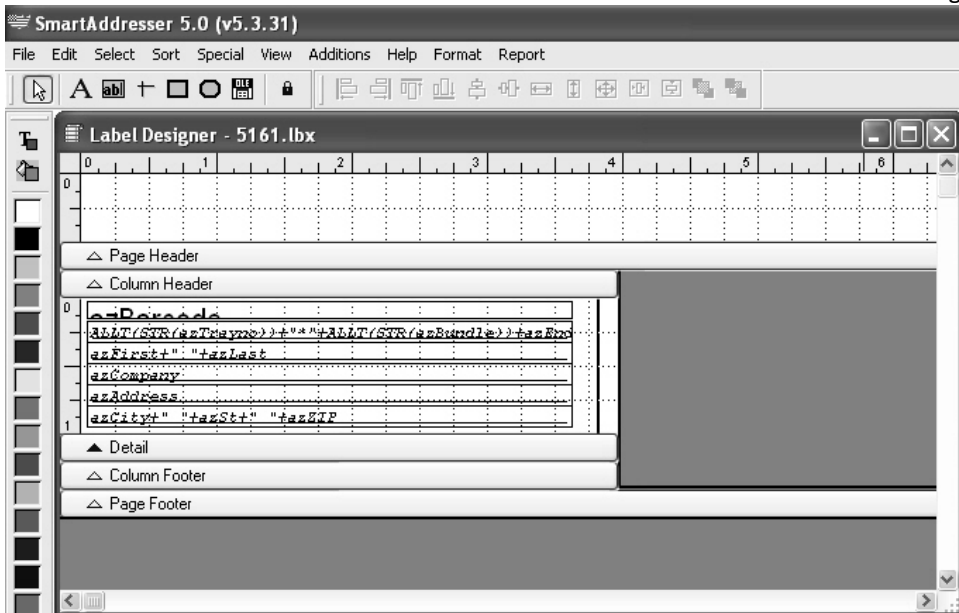
SmartAddresser 5's Label Designer makes defining the Page Layout and Page Setup simpler than ever. The Label Designer is where you'll be able to define the exact settings of the template you're using, as well as adjust the individual label height, number and size of columns in a custom environment, and assign individual printer drivers to templates. It is recommended that you first use the Label Layout Assistant found in the [Creating a New Label Template](#) topic, as most of these procedures are taken care of automatically for you. However, if you simply want to modify a pre-created template or one of your own creation, you'll find the information within this topic useful.

IDENTIFYING THE PAGE LAYOUT BANDS

We'll begin from the Print Settings window. If you're not currently in the Print Settings window, click on the Labels button (if operating from within a presort) or File>Print>Labels (if operating from within the List View). Once in the Print Settings window, follow the instructions below to adjust your page layout and setup.

Select your desired label template from the Template pull-down menu. For the purposes of this topic, we'll use the 5161.lbx template.

Click on the **Edit button** to open the Label Designer. The Label Designer is shown below:



Now that you're in the Label Designer, you will notice the gray bars (called "bands") stretching horizontally across the screen. These bands govern the vertical height of various parts of a template. A description of each of the bands is provided below:

Title (not pictured) - A *Title band* can be created for various purposes. You may wish to insert a cover paragraph on the first page of a label sheet or report, or maybe just the client's name at the top of the label print job with a job description. For instructions on creating a *Title band*, see [Creating a Title or Summary Band](#).

Page Header - At the top of the template is a *Page Header* band. A *Page Header* usually contains a combination of fixed and variable data or blank space. A *Page Header* on a report might include the report title, date or page number. A label typically won't need a *Page Header* unless the labels are setup on cut sheet laser printers and have a margin at the top of the sheet. Continuous feed labels typically do not include a *Page Header*. The *Page Header* band can be adjusted to allow for the unprintable area at the top of the page.

Column Header - If you select more than one column for your report or label, you have the option to include a heading at the top of each column that will print on every page. The *Column Header* information should be typed in using the Text Tool on the Tool Bar. See **Formatting Text and Objects** for information on using the Text Tool. For information on adding columns, see **Page Setup** later in this topic.

Detail - The *Detail* band is the physical area of a label or report template. This area usually includes fields and/or text objects, but it can also include graphics. The *Detail* band in a label template will typically include the address block data: barcode,

endorsement, name, address, city, state, and zip. The *Detail* band in a report will typically include the fields that are to be the body of the report.

Column Footer - When you include more than one column in a report or label, each column can have a footer. Footers typically display summaries and/or subtotals of the information in the column. To add columns to a report or label see **Page Setup** later in this topic.

Page Footer - At the bottom of the template is a *Page Footer* band. The *Page Footer* usually contains a combination of fixed and variable data. A *Page Footer* on a report might include the report name, date, or page number. A label typically won't need a *Page Footer* unless the labels are set up on cut sheet laser printers, and have a margin at the bottom of the sheet. Continuous feed labels typically do not include a *Page Footer*. The *Page Footer* band can be adjusted to allow for the unprintable area at the bottom of the page.

Group Header (not pictured) - If you use the *Data Grouping* feature, your label or report designer will have a *Group Header* band displayed. *Group Headers* are used to organize a label or report by the fields specified within each level of grouping. *Data Grouping* requires knowledge of Microsoft Visual FoxPro and we recommend that you contact *SmartAddresser 5* Technical Support for guidance and custom label or report creation.

Group Footer (not pictured) - If you use the *Data Grouping* feature, you will have a *Group Footer* in addition to the *Group Header* band. *Group Footers* typically display summaries or subtotals for each level of data grouping. As with *Group Headers*, knowledge of Microsoft Visual FoxPro is required, and we recommend contacting the *SmartAddresser 5* Technical Support staff.

Summary (not pictured) - The *Summary* is one or more pages that appear after the main report. It can contain summary information (totals or averages), or text that summarizes the contents of the report. Like the *Title* band, it is printed once per label or report printing. See the topic **Creating a Title or Summary Band** for instructions on creating a *Summary* band.

MODIFYING THE BAND HEIGHT

There are two methods to modify the height of the individual bands: either clicking and dragging a band to the desired position, or double-clicking the band and inputting an exact value. The latter is the recommended method for modifying the height of each band, as you can be very precise with the height of the band, allowing greater flexibility and efficiency while designing your labels. You can, however, use the grid lines and the rulers shown down the left edge of the Label or Report Designer for guides if you choose to use the click-and-drag method.

Clicking and dragging is very straightforward--click on the band and drag it up and down.

For the more detailed double-click method, follow the instructions found below:

While in the Label Designer, double click the desired band. Using the above image, we'll focus on the *Page Header* band for the purposes of this guide. You'll be presented with the *Page Header* height window:



Adjust the height of the *Page Header* band by highlighting the 0.5000 and typing in the desired value.



TIP!

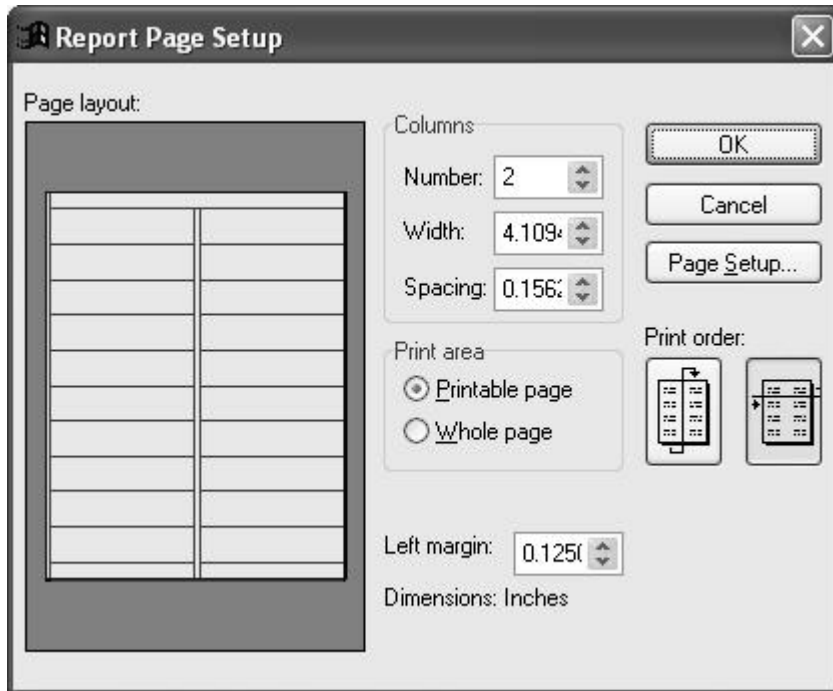
If you're an experienced *Visual FoxPro* user, you can use custom expressions under the "Run expression" area. Simply enter your desired expressions for entry and exit.

This method can be used for all bands found within the Label Designer.

ADJUSTING THE PAGE LAYOUT

The *Page Layout* window allows you to determine the number, width, and spacing of the columns in the label or report, as well as the left margin of the entire page. This section will instruct you on how to modify these settings.

From the **File Menu** while in the *Label Designer*, select **Page Setup**. The *Page Setup* window will appear:



Adjust the *Page Setup* using the options found in the window: Number of Columns, Column Width, Column Spacing, Printable Page or Whole Page, Left Margin, and the Print Order. Each of the values found in the *Columns* area is a "spinner", meaning the settings can be changed by highlighting the current value, and then typing the desired number. A secondary method would be to click on the spinner's up and down arrows to the right of the value, which raise it in predetermined increments. A description of the settings follows:

COLUMNS

Number - The *Number* spinner allows you to specify the number of columns in the label or report.

Width - This spinner allows you to specify the width of the individual columns.

Spacing - The spacing spinner allows you to modify the width of the space between the columns.

PRINT AREA

Printable Page - If you choose the *Printable Page* option, *SmartAddresser 5 5.0* will adjust the *Page Layout* to fit within the constraints of the template's currently assigned printer driver and paper size. A rectangle shown on the page preview area to the left represents the printable page margins.

Whole Page - If you select the *Whole Page* setting, the edges of the actual page will be adjusted to the absolute minimum margins for the *Page Layout*. Some printers cannot print to the extreme edge of the page, but *SmartAddresser 5 5.0* will use the page in its entirety for its printing. If your printer model cannot print to the entire page, select the *Printable Page* option.

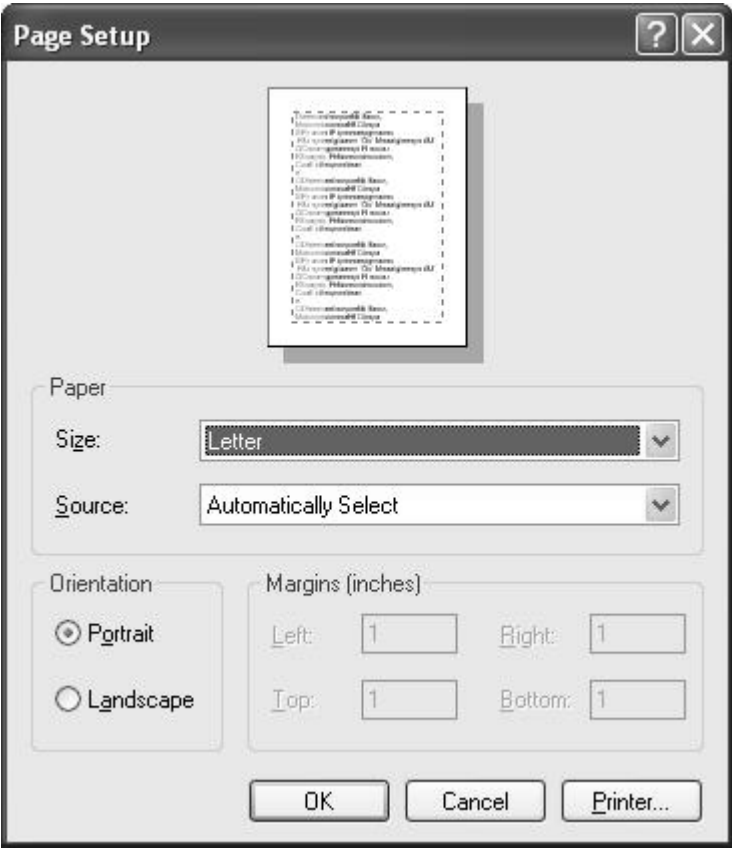
LEFT MARGIN

Left Margin - The *Left Margin* spinner allows you to adjust the margin on the left side of the entire sheet.

PRINT ORDER

Print Order - The *Print Order* selection in the *Page Setup* window displays a graphic button demonstrating the order that the labels will print in. When using multiple columns, the first button will print the labels down in each column before moving to the next. Using the second option will print the labels across in rows prior to moving down to the next row.

Click **OK** to return to the *Label or Report Designer*, or click the **Page Setup** button to access the next window in the *Page Setup* process. You'll be presented with the next *Page Setup* window:



This area of the *Page Setup* allows you to modify the available paper sizes, as well as the source from the currently selected printer driver. To change the printer driver that the current template will print to, click on the **Printer** button and select the new printer.



TIP!

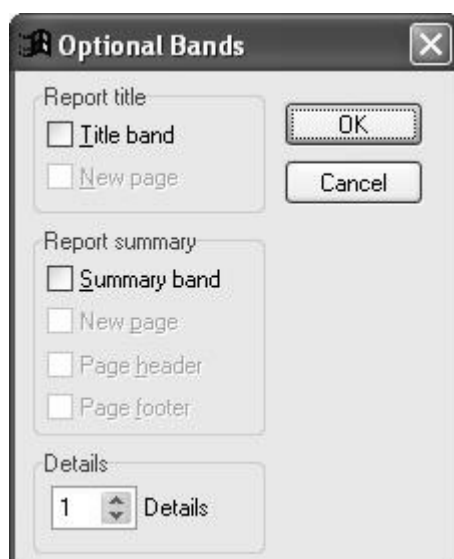
After making changes to the printer associated with your label template you will need to save the **Printer Environment**. To do this, go to the **Report** menu within the Label Designer window, and click on **Printer Environment**.

When you're finished modifying the band heights and the *Page Setup*, you can click **OK** on any *Page Setup* windows to return to the *Label Designer* and either continue adjusting the content, or close and save the template.

CREATING A TITLE OR SUMMARY BAND

Creating a *Title* or *Summary* band within the *Label* or *Report Designer* allows you to create custom content that will print once per print job—at the beginning for a *Title* band, or at the end for a *Summary* band. Below are instructions for creating custom *Title* and *Summary* bands. These instructions will pertain to modifications you can make while in the *Label* or *Report Designer* exclusively; for instructions on entering the designers, see [Editing Label and Report Templates](#).

While in the *Label* or *Report Designer*, click on the **Report** menu, and then select **Optional Bands**. The *Optional Bands* window will appear, as shown:



Check the desired options. Descriptions are provided below:

Title Band Options

Title Band - Creates a *Title* band in the Label or Report that prints once per print job.

New Page - Issues a page eject command to the printer after the title is printed.

Summary Band Options

Summary Band - Creates a *Summary* band in the label or report that prints once per print job.

New Page - Issues a page eject command before the summary is printed

The Page Header and Page Footer options are unused.

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Click **OK** to close the Optional Bands window and return to the Label or Report Designer. You will then see the new band(s) displayed in the design view:

The screenshot displays the SmartAddresser 5 design view. At the top is a horizontal ruler with markings from 0 to 4. Below the ruler are several bands, each with a collapse/expand icon (triangle) on the left. The bands are: Title, Page Header, Column Header, Detail, Column Footer, Page Footer, and Summary. The Detail band is expanded, revealing a table with data. The table has a header row with the following fields: `ALLT(STR(azTrayno))+"*"+ALLT(STR(azBundle))+azEnc`, `azFirst+" "+azLast`, `azCompany`, `azAddress`, and `azCity+" "+azSt+" "+azZIP`. The table contains one data row with the following values: `1`, `1`, `1`, `1`, and `1`.

You can now adjust the *Title* and *Summary* bands using the methods described in the [Page Layout and Page Setup](#) topic. Any information you create within the *Title* or *Summary* area will only print at the beginning or end of the print job, respectively.

ADVANCED ADDING AND COMBINING OF FIELDS

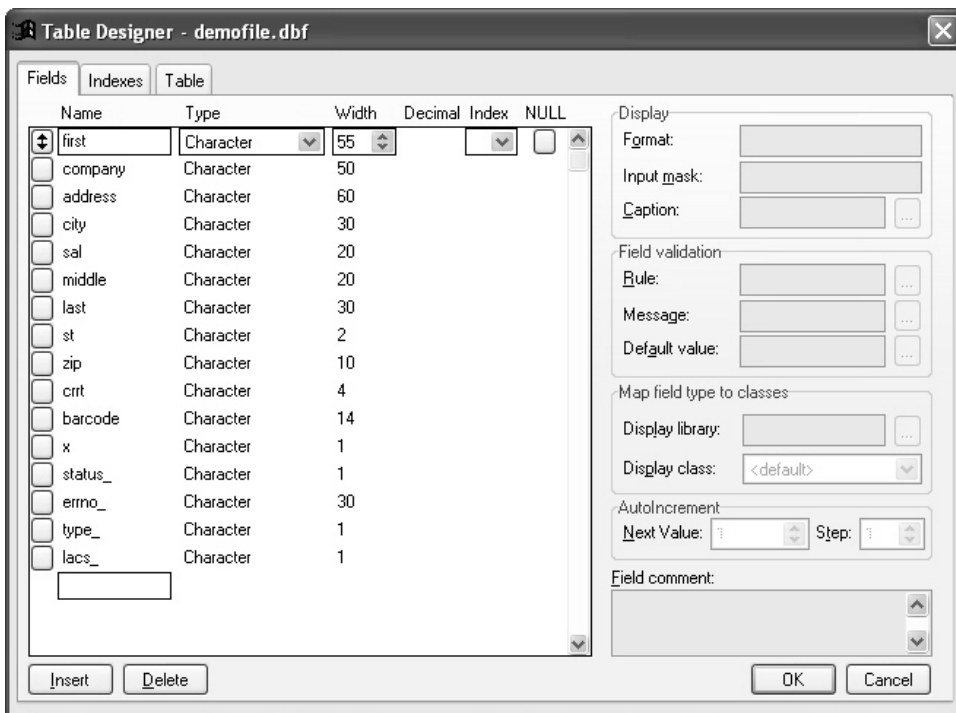
The *SmartAddresser 5 Label* and *Report Designers* allow you to place fields in any band of the template. Because *SmartAddresser 5* is written using the Microsoft *Visual FoxPro* programming language, fields can be added using that language and syntax. There are many ways to add fields to your templates, but this topic will help you understand the functions and uses of the various methods. First, you'll need to understand some field fundamentals to help with the template field creation process. It is recommended that new users make use of the [Label Layout Assistant](#) to help create their templates. If you want a template to do something specialized and can't quite figure out how to do it, please feel free to contact the [SmartAddresser 5 Technical Support Department](#).

One of the biggest hurdles that new users (and sometimes even long time users!) have would be defining whether the field that they're adding is "character", "numeric", "date", or some other field type. You could have a field that contains nothing but numbers, yet when you use a numeric expression, it gives you an error. That's where this guide comes in. When you understand how to identify the type of field you're printing, and how to combine it with other fields, template creation becomes incredibly simple. Use this in conjunction with the [Label Layout Assistant](#) and the instructions found in the [Page Layout and Page Setup](#) and [Creating a Title or Summary Band](#) to create any type of label or report that you want.

DEFINING THE FIELD TYPE

The first step for any user attempting to create a custom label is to determine the field types that he or she will be printing. The steps to do this are extremely simple, yet critical. To do so, you'll want to be looking at your database in the List View, and then follow the instructions below.

From the **Edit** menu, select **Fields**. The *Table Designer* window appears, as shown below:



As you may notice, most databases have many fields that list *Character* in the second column. Character fields can contain letters, numbers, or symbols. However, you'll also notice the "account" field listed in the *Table Designer* is identified as a *Numeric* field

type. Furthermore, the field "exp_date" is identified as a *Date* field. These are the three most common field types that you'll print on a label or report, and each require different expressions to combine together. If you're unsure of the field types that you'll be printing, or you get errors like "Invalid Function, Argument, Type, or Count", or "Data/Type Mismatch", you could be dealing with a situation where you are using the incorrect expression for the field types assigned. If you run into issues like this and cannot identify the problem after reading through this topic, do not hesitate to contact the **SmartAddresser 5 Technical Support department**, where highly trained technicians can determine the cause of the problem.

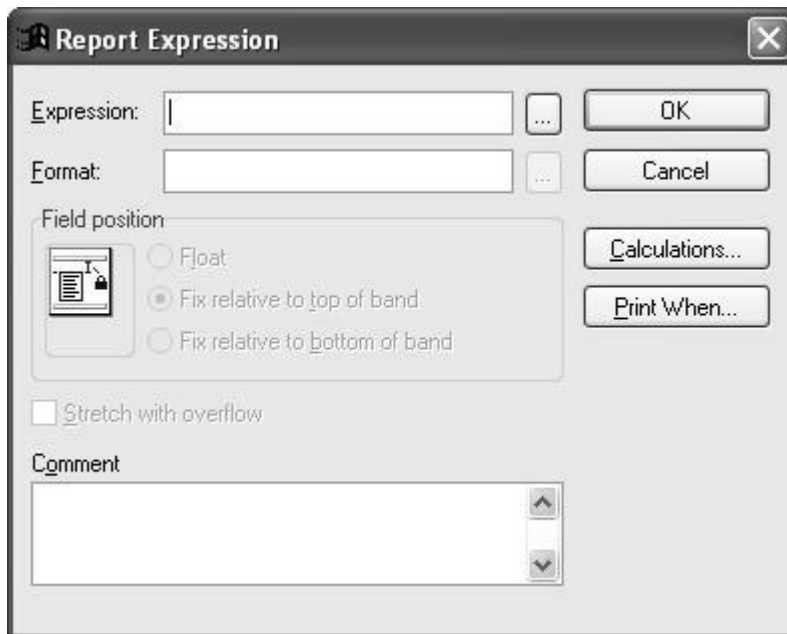
Clearly identifying your field types and desired arrangement will make you a much more efficient list processor and printer, and the *Table Designer* can help you reach that goal.

Adding Character Fields to the Label or Report Template

For the next set of instructions, you will be operating from within the *Label* or *Report Designer*. For instructions on how to enter the *Label* or *Report Designer*, see [Creating a New Label Template](#) and [Opening Label and Report Templates](#). Once you are inside of the *Label* or *Report Designer*, and you are clear on the field types that you'll be printing as identified using the preceding instructions in this topic, you're ready to continue.

In the *Label Designer*, click the Add Field button on the *Report Controls Toolbar*. Your cursor will become a cross hair to allow you to draw a precise box that will become your new field.

Position your cursor within the *Label Designer* where you will want the top left corner of the new field to be. Click and hold the left mouse button, and use the ruler guides along the left and top edges to drag to the position where you'll want the lower right corner of the field to be. Release the left mouse button, and you'll be presented with the *Report Expression* window:



The critical area of the screen to the left is the "Expression" box. Within this text box, you will place the syntax that will allow your template to print specific fields. There are many ways to do this, and all are useful under different circumstances. However, this guide will note the three core methods of adding fields to an expression:

Option 1: "az" method - The *"az" method* uses a set of variables created by *SmartAddresser 5* programmers for the default fields found within the **Default Fields and Attributes**. If your database contains *SmartAddresser 5* default names, then the *"az" method* will work perfectly, but takes a bit more work than the next option. Between the fields, you'll need to either insert a comma or plus signs with quotation marks and a space between them to tell *SmartAddresser 5 5.0* that you want to print a space between each field. Examples of the *"az" method* would be:

azFirst+" "+azLast

or

azFirst,azLast

azAddress

azCity+" "+azSt+" "+azZip or azCity,azSt,azZip

Option 2: "Field,Field" method - The *"Field,Field" method* allows you to combine any fields together on a single line, providing they are all character fields. It will also work for a single field name by itself. Some examples of *"Field,Field" method* expressions would be:

first,last
address
city,st,zip

Notice that there are no spaces between the field names, only a comma. This method will also remove any extra spaces that would normally be present using the third option, without all the complicated expression syntax that it would normally require.

Option 3: "ALLTRIM" method - The *"Alltrim"* method allows you to use the three primary functions (ALLTRIM or ALLT for Character fields, STR for Numeric Fields, and DTOC for Date fields) in conjunction with plus signs to combine fields. Between fields, you'll want to put any static text in between quotation marks to avoid the two fields printing right next to each other with no space separating them. Examples of *"Alltrim"* method expressions would be:

ALLT(first)+" "+ALLT(last)

Or

ALLT(first),ALLT(last)

ALLT(address)

ALLT(city)+" "+ALLT(st)+" "+ALLT(zip) or ALLT(city),ALLT(st),ALLT(zip)

That's a lot of information to process, we know! However, most users will find that the *"Field,Field"* method works most of the time for the standard list. Simply create the *Report Expression* window using the steps provided at the beginning of this topic, and then fill in the *Expression* box with the field names that you want to print, separated by commas with no spaces. In addition, if you simply added the fields together using the *"az"* or *"Alltrim"* method expressions, then the field in its entirety would be printed--not just the content inside. In short, this means that if you had a name that was 10 characters long in a 50 character field, you'd have your 10 characters of information, followed by 40 empty spaces. The *"az"*, *"Alltrim"*, and *"Field,Field"* methods **all** trim the fields to print just the content and leave out the leading and trailing spaces.



TIP!

Create one label line with the "Add Field" button . Once you create the expression, click the **OK** button to return to the *Label Designer*. The created line will still be active, indicated by the black dots on the corners, sides, top, and bottom. You can now use the Windows shortcuts for Copy (CTRL+C) and Paste (CTRL+V) to duplicate the line. Drag the newly created duplicate line into position by clicking and dragging the mouse button. If the snap to grid option is on, and you find the box jumping around as you drag (and not moving smoothly), you can hold the CTRL key on your keyboard to temporarily disable the grid. Once the new line is placed in the desired location, simply double click it to bring up the

Report Expression window and modify the Expression directly. This way you won't need to create and resize multiple lines--you can simply create one and then duplicate it with the exact height and width of the other lines!

Adding Numeric or Date Type Fields to the Expressions

Adding fields other than character fields requires slightly different syntax. It's not any more difficult, you just have to keep in mind that numeric and date type fields must first be converted to a character string to print with other character fields. Those expressions to convert numeric and date type fields to character strings follow:

Numeric Fields - ALLT(STR(fieldname))

This converts the numeric field to a character string, and then uses the "Alltrim" expression to remove any leading or trailing spaces, printing only the numerals.

Date Fields – DTOC(fieldname)

This converts a date field to a character expression...literally translated, it would be "Date TO Character".

Using the previous example in the *Table Designer*, if you wanted to create a single label line with Company (Character), Account (Numeric), and exp_date (date), then you'd need to use the following expression. We'll use the "Alltrim" method with the conversion strings as well:

```
ALLT(company),ALLT(STR(account)),DTOC(exp_date)
```

That will print the company, a space, the account, another space, and then the expiration date fields.

ADVANCED EXPRESSIONS TO ADD STATIC TEXT

For the last expression modification to be found within the user's guide, we'll deal with adding something *other than a space* between fields. We'll stick to the previous example, but if you wanted to add "Customer #" before the account number, and "Expiring" prior to the expiration date, you'd want to use plus signs with quotes instead of the commas separating the fields. You'll want to put the exact text, including spaces, between the quotes, which are in turn between the plus signs. To make it sound even more complicated, those plus signs are between the fields and the functions. It sounds tricky, but it's not when you really look at it.

"Functions" usually have parentheses around a field name. These functions trim a character field, or convert numeric fields or date fields. They can also be used to print portions of fields, among other advanced features. Any time you are printing a field with a method *other than* the "az" method, you'll be adding a function of some sort to

the field name. Whether it's an *ALLTRIM*, the "az" variable found within the default fields, or some other expression, you'll be using functions to trim the field down or otherwise streamline its appearance.

Between those functions and fields, you'll have a plus sign, indicating that you're joining the field with something else. If you're joining it with a space, you'd have quote-space-quote to tell it to print whatever is between the quotes--in this example, a space. Since we want it to print "Company #" between the quotes, we type exactly that, with a space before the word "Company" so it doesn't print right next to the company name field:

```
ALLT(company)+" Company #"+ALLT(STR(account))
```

It's that simple! To complete the guide's instruction, we'll add the final "Expiring" message--again, with a space after the word to avoid printing it directly next to the date. The entire expression, when completed, will read:

```
ALLT(company)+" Company #"+ALLT(STR(account))+" Expiring "+DTC(exp_date)
```

That would print a line that looked like this (company is in red, static text is in black, account is in green, and the exp_date field is in blue).

ABC Plumbing, Inc. Company #12345 Expiring 07/31/2007

Again, some of this is using intermediate to advanced *Visual FoxPro* syntax for the label expressions, so if you're having trouble understanding it, feel free to contact the **SmartAddresser 5 Technical Support Department**, or review the usage of the **Label Layout Assistant**.

ADDING TEXT AND GRAPHICS

In *SmartAddresser 5's* *Label* and *Report Designers*, it's easy to add static text and graphic images to your labels and reports. Using the *Report Controls* toolbar (pictured below), you can easily add fields, lines, text, shapes, pictures, and more. Detailed descriptions of the buttons and their uses are found in this topic.



This *Report Controls* toolbar is located at the top of the *Design View*, and allows you to modify the content found on your label or report. The individual button purposes are as follows:

Object and Shape Creation Tools



Select Objects - Allows you to select objects before moving or resizing them. This feature is explained in **Formatting Text and Objects**.



Label - Adds a static text object to the template. To use the tool, click on the *Label* button and then click in the location where you wish to add the text.



Field - Allows you to place fields from a database within the template. For complete instructions on adding fields in the *Label* or *Report Designer*, see **Adding and Combining Fields**.



Line - Allows you to create custom lines within the *Design View*. To use the tool, click on the *Line* button to initiate the line controls. Click in the *Design View* where you want your line to begin, and drag the mouse to the desired ending location for the line. Release the mouse button, and the new line is created.



Rectangle - Allows you to create a rectangle within the *Design View*. To use the tool, click on the *Rectangle* button to initiate the rectangle controls. Click in the *Design View* where you want your rectangle's upper left-hand corner to be, and drag the mouse to the desired location for the bottom right-hand corner. Release the mouse button, and the new rectangle is created.



Rounded Rectangle - Allows you to create a rectangle with rounded corners within the *Design View*. Use the same method that was described in the *Rectangle* description above.



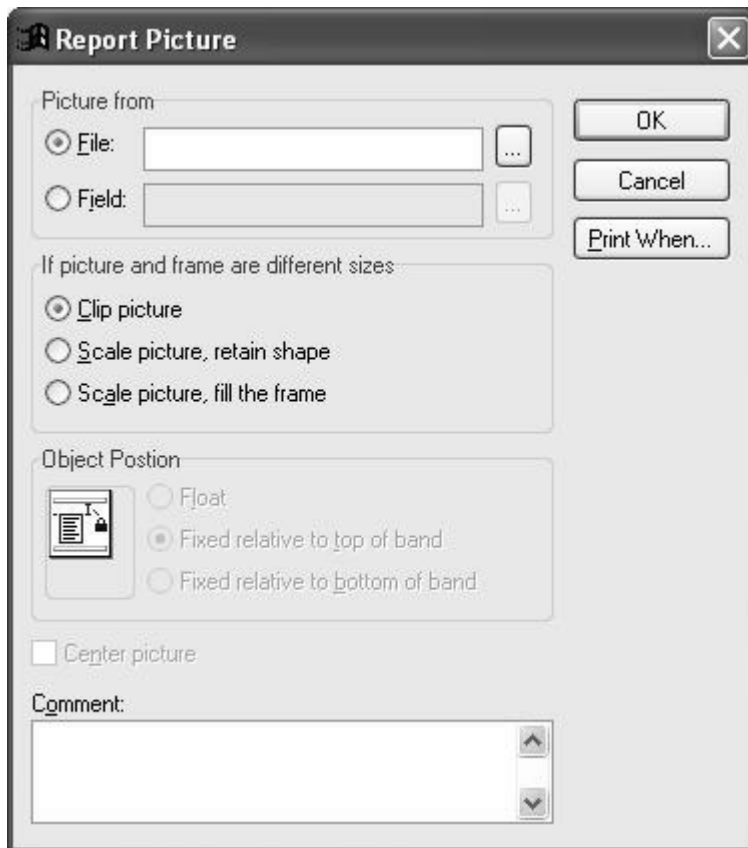
Picture/OLE Bound Control - Allows you to insert an image file into the *Label* or *Report Designer*. To insert an image, use the following procedure:

Click on the *Picture/OLE Bound Control* button .

Position the mouse where you want the upper left-hand corner of the picture to appear.

Click the left mouse button and drag to the lower right-hand corner of the desired picture location.

Release the left mouse button and the *Report Picture* window appears:



Choose the appropriate radio button in the *Picture From* area.

Choose *File* if you are selecting a single picture to be inserted into the label or report. The *Field* option is for the advanced *SmartAddresser 5 5.0* or *Visual FoxPro* user, and it allows pictures to be placed from within a field in a database file. If you require additional information on this, please contact the **SmartAddresser 5 Technical Support Department**.

Select the desired option from the *If picture and frame are different sizes* area. Descriptions of the available options are found below:

Clip Picture - If the picture is bigger than the frame you created in the template, *Clip Picture* will show a section of the original image in the object frame, retaining the picture's original dimensions. The picture is anchored at the top and at the left of the frame. You cannot see the lower right portion of the picture that extends beyond the frame.

Scale picture, retain shape - Choosing *Scale Picture – Retain Shape* will display the whole picture, filling as much of the object frame as possible while retaining the proper aspect ratio of the picture file. This will protect the picture from vertical or horizontal distortion, or "stretching".

Scale picture, fill the frame - Choosing *Scale Picture – Fill the Frame* will display the whole picture in the object frame in the template. The picture will be distorted vertically and horizontally to fit the frame in most cases.

Interface Control Tools



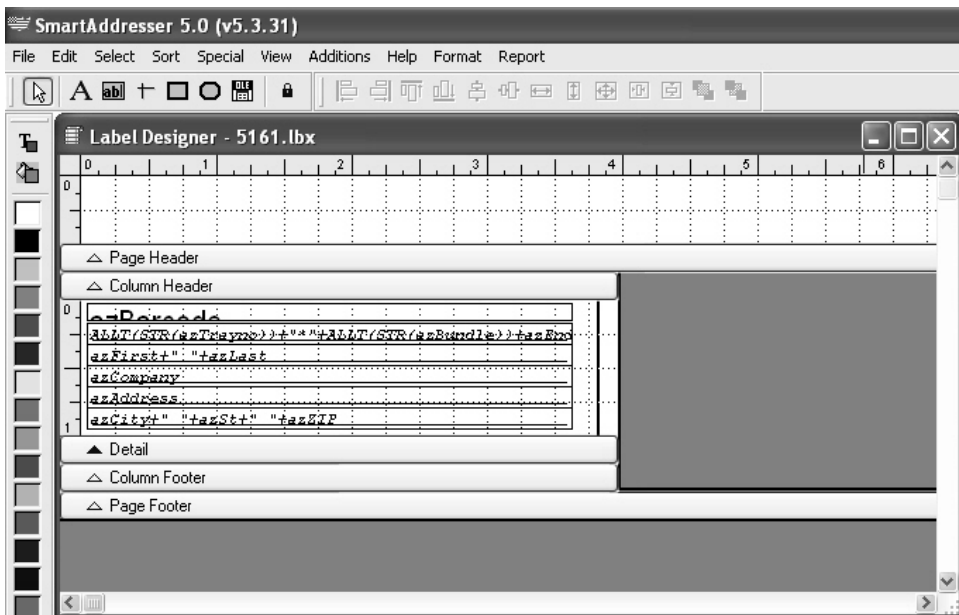
Button Lock - The *Button Lock* tool allows you to lock the currently active tool. With the *Button Lock* off, the interface will default back to the *Select Objects* tool after creating a line, shape, or inserting an image. Enabling *Button Lock* will allow you to create multiple shapes without re-selecting the appropriate tool. The current creation tool will remain active until you manually enable the *Select Objects* tool.

Using the tools described in this topic, you can create, resize, align, and position practically anything you wish within the *Label* and *Report Designer*!

FORMATTING TEXT AND OBJECTS

Label and Report templates are composed of objects that can be manipulated in a variety of ways. These objects include text, fields, and graphics. Once you have added objects to a report or label template, you can resize, align, and move them around within the template, or even adjust the color and overall look. The *Layout* toolbar (and most of the options under the **Format** menu in the Label or Report Designer) will assist you with the alignment and placement of objects. The *Layout* toolbar, the *Color Palette* toolbar and the **Format** menu also offer features that will change the look of objects. Text colors, background colors, and font choices and sizes are all available from the toolbars and the **Format** menu.

When you open or edit a label/report template, the Label/Report Designer appears as shown below:



You can see the toolbars running down the left-hand side and across the top of the *Label Designer*. There are three toolbars available to create and manipulate text and objects, including the color palette.

REPORT CONTROLS TOOLBAR



The *Report Controls* toolbar contains the tools to add static text, fields, and graphics. See [Adding and Combining Fields](#) or [Adding Text and Graphics](#) for instructions on using the tools available on this toolbar.

LAYOUT TOOLBAR



The *Layout* toolbar allows you to manipulate multiple objects in reference to one another. The tools found on this toolbar *only* enable when you have more than one object currently selected within the *Design View*. To select more than one object, either drag a selection box around the desired objects or shapes within the *Label* or *Report Designer*, or hold the Shift key on your keyboard while single-clicking on each object that you wish to toggle as active.



Align Left Sides - Aligns the left edges of selected objects.



Align Right Sides - Aligns the right edges of selected objects



Align Top Edges - Aligns the top edges of selected objects.



Align Bottom Edges - Aligns the bottom edges of selected objects.



Align Vertical Centers - Repositions the selected objects so that they all have the same vertical center.



Align Horizontal Centers - Repositions the selected objects so that they all have the same horizontal center.



Same Width - Resizes the selected objects so that they all have the same width.



Same Height - Resizes the selected objects so that they all have the same height.



Same Size - Resizes the selected objects so that they all have the exact same dimensions.



Center Horizontally - Repositions the selected objects so that they are centered on the current page width.



Center Vertically - Repositions the selected objects so that they are centered on the current page height.

LAYER TOOLS

The following tools on the *Layout* toolbar allow you to reposition the layers of objects within your design view. Selecting a single object and then using the next two options will shift its current position with regards to the active layer within the template.



Bring to Front - "Pulls" the active object toward you as viewed on the monitor, placing it in front of all other objects on the template. Useful if you need to make sure that a particular object is always on the top, or visible above all over

objects.



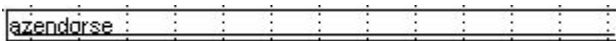
Send to Back - "Pushes" the active object away from you as viewed on the monitor, sending it behind all other objects on the template. Useful for background images and other objects that you wish to have in the background.

MANUALLY MOVING AND RESIZING OBJECTS

It is possible to manually move text and objects as well as using the alignment tools to automatically position them. To do so, the first thing you'll need to do is to select the object by single-clicking it. When active, an object will appear with black *resize handles* on the corners and sides. Here is an example of a selected object--in this case, the *azEndorse* line of a standard label template:



Compare that to the inactive *azEndorse* line below, and you'll see the differences...the black dots signify that any action you take using the toolbars or menus will affect the currently selected object.



The first image has obvious *resize handles* on all edges and corners, whereas in the second image, they are noticeably absent. To move or resize any object, you'll first need to select it by clicking the *Select Objects* button  from the *Report Controls* toolbar, and then single-clicking on the object that you wish to set as active.

MOVING THE CURRENTLY SELECTED OBJECT

Once your object is active, you can simply click and hold the left mouse button inside of the object (*not* directly on a resize handle or edge) and drag the mouse to a new location. You'll see a dashed "outline" of the object's size to allow easier movement and judgment on the final placement of the object, as shown:



When you release the left mouse button, the currently selected object will snap to the "outlined" area. It's that simple!



TIP!

If you have *Snap to Grid* enabled from the **Format** menu, objects that you move may "snap" several pixels on screen at a time. To override the *Snap to Grid* functionality, hold down the CTRL key on your keyboard when initiating a drag. This will move the object smoothly, ignoring any *Snap to Grid* settings. For more information on *Snap to Grid*, refer to the **Snap to Grid** area of this topic.

Resizing the Currently Selected Object

Resizing an object is very similar to moving an object. The main difference is that, instead of clicking directly in the center of an object, you will click on one of the *resize handles* positioned on the edges of the object. When you click the left mouse button on a *resize handle* and drag the mouse, the dashed "outline" will resize based on the opposite edge of the object that you have clicked on.

CHANGING OBJECT ATTRIBUTES - THE FORMAT MENU

All of the buttons in the *Layout* toolbar are also available under the Format menu. The Format menu also includes functions for the grouping and ungrouping of objects, the *Snap to Grid* feature, setting the *Grid Scale*, adjusting the font, and adjusting text alignment. Menu items that are not also found in the *Layout* toolbar are described in detail below:

Horizontal Spacing - The **Horizontal Spacing** selection allows you to adjust the horizontal spacing between multiple objects with a single click. Spacing may be increased, decreased, or made equal between all objects from the sub-menu.

Vertical Spacing - The **Vertical Spacing** selection allows you to adjust the vertical spacing between multiple objects with a single click. Spacing may be increased, decreased, or made equal between all objects from the sub-menu.

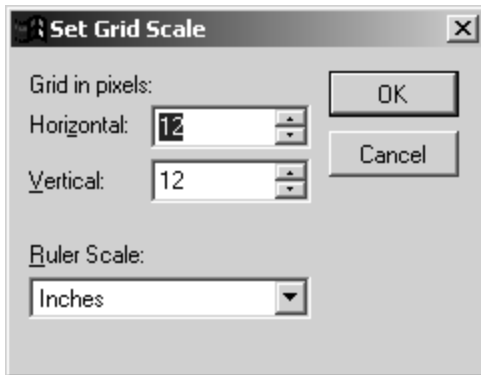
Group - Group joins multiple selected objects so that they can be manipulated as a single object. If, for example, you have more than one object selected, you can choose **Group** from the **Format** menu. This will allow the objects to be positioned, cut, and pasted as if all objects in the group were a single object. You cannot change the font size or change the color of grouped objects.

Ungroup - **Ungroup** separates previously grouped objects so that they may be manipulated individually.

Snap to Grid - **Snap to Grid** is the default setting for every template in the *Label* and *Report Designer*. When this option is checked within the **Format** menu, an invisible alignment grid is toggled on so that objects are automatically aligned to the nearest grid

line when they are resized or repositioned. The alignment grid corresponds to the grid size set within the *Ruler/Grid* dialog window. To override the grid when resizing or repositioning an object, press the CTRL key on the keyboard while dragging the selected object or *resize handle*.

Set Grid Scale - When you choose the **Set Grid Scale** selection from the Format menu, you will be presented with the **Set Grid Scale** window as shown:



The **Grid Scale** can be adjusted in pixels on your computer monitor. The horizontal and vertical spinners adjust the size of the invisible alignment grid for the labels or reports. Objects are automatically aligned to this grid if **Snap to Grid** is selected from the **Format** menu. The maximum horizontal and vertical setting is 96 pixels (increased from the 48 pixels that *SmartAddresser 5 4.0* used). To override the grid when repositioning or resizing an object, press the CTRL key on your keyboard while dragging the object or *resize handle*.

You can also adjust the display measurements that the ruler uses while in the *Label* or *Report Designer* by selecting the desired measurement scale in the *Ruler Scale* pull-down menu. The available choices are None, Inches, Centimeters, Pixels, or System Default.



TIP!

With a very low resolution (800x600 desktop resolution, for example), you may need to lower the default values to get smoother grid behavior while dragging objects. Higher resolutions (1600x1200, 1680x1050 widescreen, for example) will probably require a higher grid setting to have a visual effect while dragging or resizing.

Font - Selecting **Font** from the **Format** menu will open the *Font Dialog Box* so that you may set the typeface, style, and size of the characters in a selected object. The default font for all label and report lines is Arial, Standard, 8 point size.



TIP!

Before changing the font size of a default label line, you *must* select the font! By default, the font line is blank...when you adjust the size without selecting the font, it will revert back to the default Arial 8 point. To assign a new font size, either first select the Arial font or your preferred font, and then assign a new point size.

Foreground Color - Choosing **Foreground Color** from the **Format** menu displays a *Color* window, allowing you to choose the color of the font. While the box border will also change to reflect that color, the border still will not print by default.

Background Color - Choosing **Background Color** from the **Format** menu displays a *Color* window, allowing you to choose the color of the shape. Background will not affect a *Field* box by default, as the background is set to *transparent* by default. For more information on changing the *Backstyle*, see the **Backstyle** section of this topic.

Text Alignment - Choosing **Text Alignment** from the **Format** menu displays a sub-menu where you can select to align text within objects to the left, center, or right, or adjust the line spacing to single, 1 ½, or Double spacing.

Fill - Choosing **Fill** from the **Format** menu displays a sub-menu that allows you to fill selected shapes (not created fields) with one of seven additional fills and patterns. The default is none.

Pen - Choosing **Pen** from the **Format** menu displays a sub-menu that allows you to set the point size and design pattern of lines and outlines of rectangles and rounded rectangles.

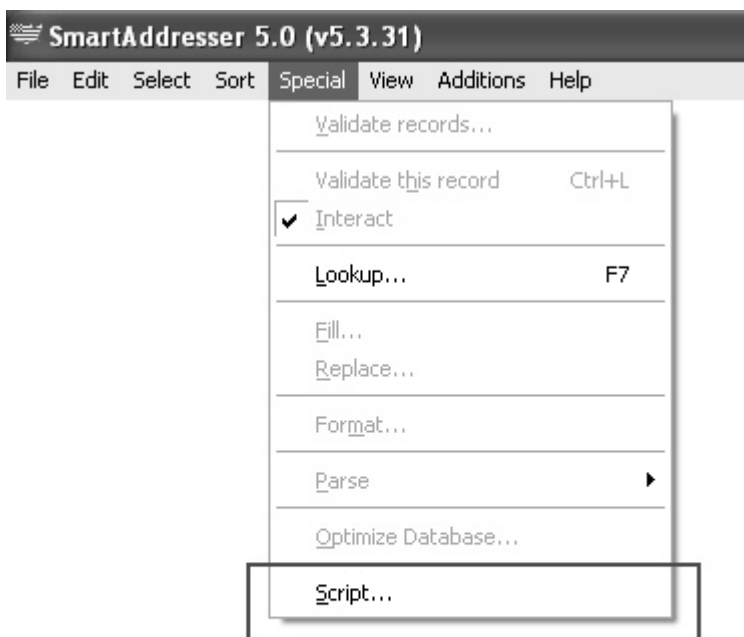
Backstyle - Choosing **Backstyle** from the **Format** menu displays a sub-menu that allows you to determine whether the selected object is opaque or transparent. Opaque prevents objects behind the selected object from showing through it. A Transparent setting allows objects behind the selected shape or field to show it.

USING SCRIPTS

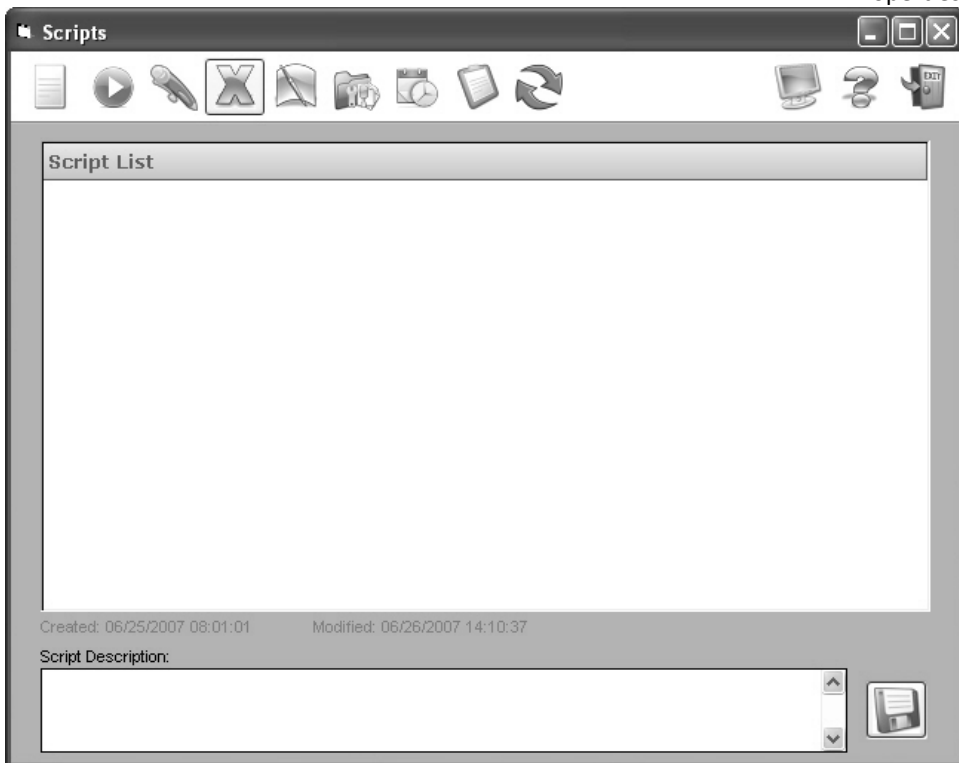
INTRODUCTION TO SCRIPTS

Have a repetitive job that runs with the same settings, time after time? How about scheduled processing that you would like to set up to run over the weekend when you're not present? With the powerful Scripting Engine within *SmartAddresser 5*, you can do that and more. Setting up script routines is as simple as selecting a menu and a menu selection that you'd like to perform, creating an event sequence in the easy-to-use Script Editor. Getting your processes automated in *SmartAddresser 5* is quick and easy. Here's how to get started.

To enable the Scripting feature, you'll need to close any active database or window within *SmartAddresser 5*, then click on the Special menu and "Script" will be available.



Once you've entered the Script Window, you'll be able to create or modify any scripts that are saved on the system. The first time you enter the Script window, you'll be looking at an empty box, waiting for you to create your first script:



From this window, you will be able to create and modify existing scripts, copy script files, set up a watch folder and edit the script text (more on that in the Advanced Scripting section), and more. Here are descriptions for all buttons on the window:



Create Script

The Create Script button allows you to create a new script from scratch, and add events as desired.



Run Script

The Run Script button allows you to run a selected script that has been previously created and saved.



Edit Script

Clicking this button will bring up the Script Editor window, which allows the creation of new script events, or alteration of existing events.



Delete Script

Deletes the currently selected script.



View Script Text

The View Script Text button will open up the actual script text file in a text editor, allowing advanced users to manually modify the syntax.



Setup Watch Folder

Setting up a Watch Folder is an advanced feature in the scripting engine, covered in the Watch Folders section. It allows you to set a specified folder to "drag and drop" files to and automatically have SmartAddresser 5 5.0 run a previously created script using the watch folder criteria.



Script Timer

The Script Timer is another advanced feature, used in conjunction with the Watch Folder. Use this feature to set predetermined start and stop times for selected scripts when using the Watch Folder.



Copy Script

The Copy Script button allows you to make a duplicate of an existing script.



Refresh

The Refresh button will refresh the current Script Window, showing any modified script names or added files to the configured watch folders.



Monitor

The Monitor button toggles SmartAddresser 5's Watch Folder feature. SmartAddresser 5 5.0 will monitor a specified folder for files matching the Watch Folder criteria, and run the pre-configured script automatically when the folder contents change.



Help

The Help button opens this help page.



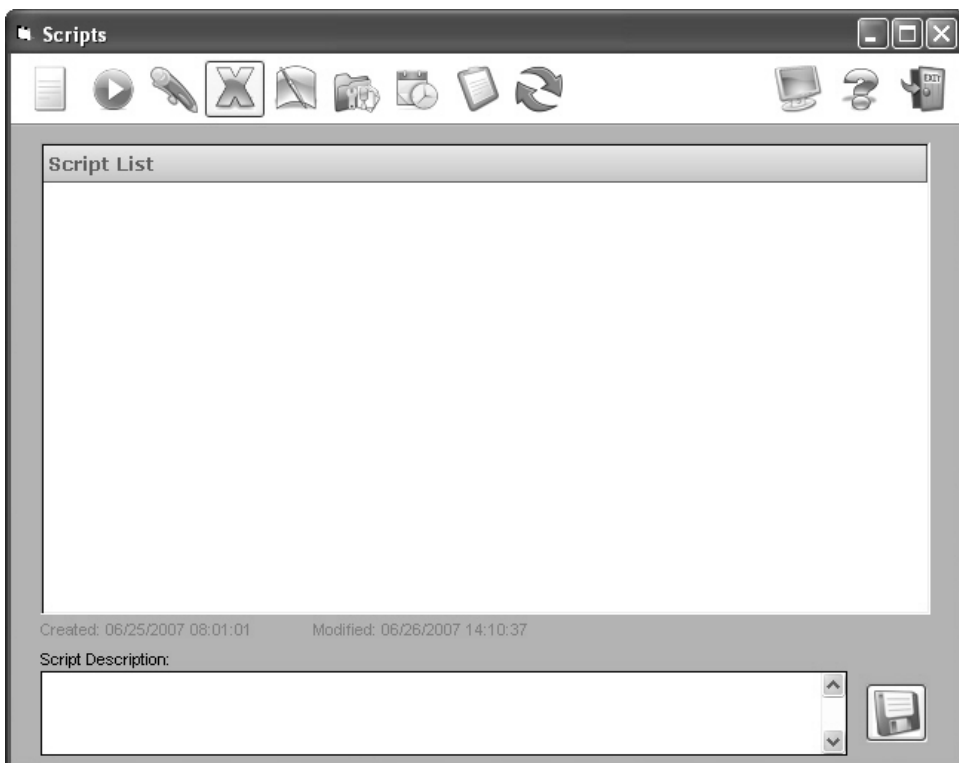
Close

Clicking the Close button will close the Script window

SMARTADDRESSER 5 SCRIPTING TUTORIAL

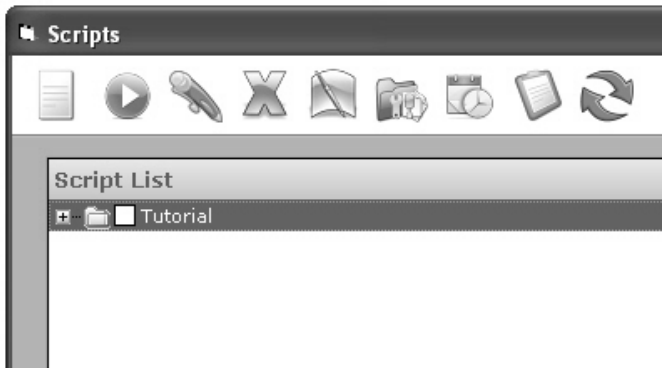
Welcome to the *SmartAddresser 5* Scripting Tutorial! It is highly recommended that you first complete the [Introductory Tutorial](#) in the Getting Started section prior to completing this tutorial. The Basic Tutorial will give you a firm understanding of the program functions, and will make automating those functions much simpler. If you already have a working knowledge of SmartAddresser 5, then the Introductory Tutorial may not be necessary. This scripting tutorial will demonstrate how to automate the same processes that were used in the Introductory Tutorial, with the only difference being right in the beginning. When scripting, you do not launch from the Open/Create Window, and there's no option for the Open/Create Window in the script editor, so we'll use File>Open List to open a new list. Let's get started!

With *SmartAddresser 5* open, close the Open/Create Screen if it appears, as well as any active files. Click on Special>Script. The Scripts Window will appear. For more information on the Script Window and button descriptions, see [Introduction to Scripting](#).





With the Scripts Window open, click the Create button . A new script will be created in the Script List window, which you can then click on and rename as desired. For the purposes of this tutorial, we'll rename it "Tutorial". Press Enter on your keyboard when finished renaming and the script will have the new name showing in the highlighted bar, as shown below:



TIP!

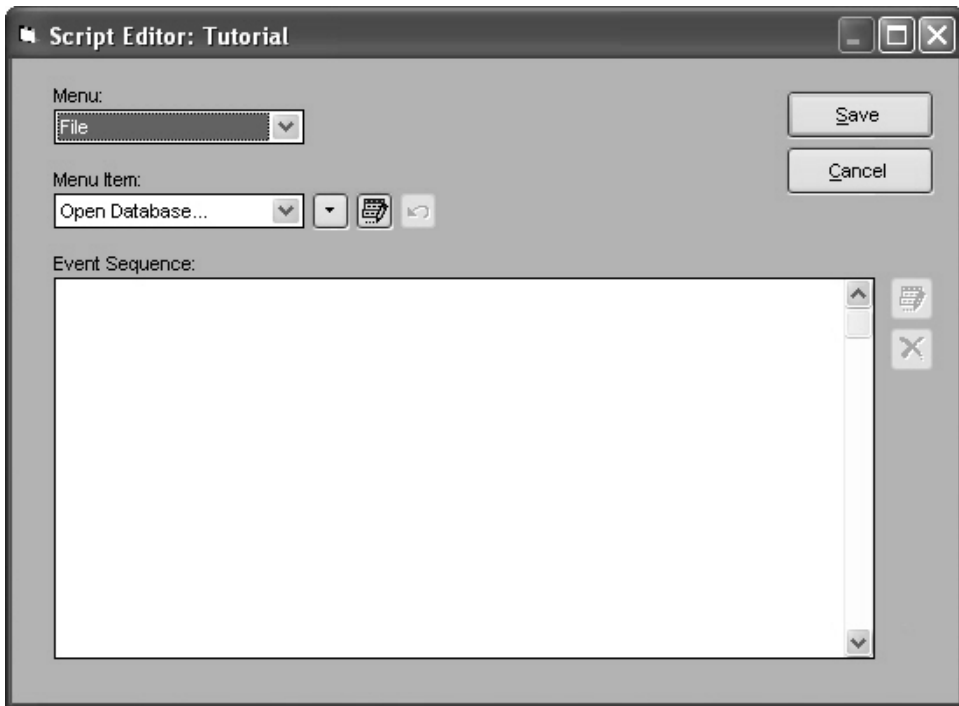
Give your scripts appropriate names that make sense to you. By default, it uses a date/time stamp naming convention, but rename it to something that will remind you of what the process does. A client that requires a consistent process be used every time is a perfect example of how scripting can save you time. Create a script, rename it to your client's name and run it whenever their jobs come in!

Once you've renamed your script, it will still be highlighted in the Scripts window. Click



the Edit button

to open up the script editor, as shown below:

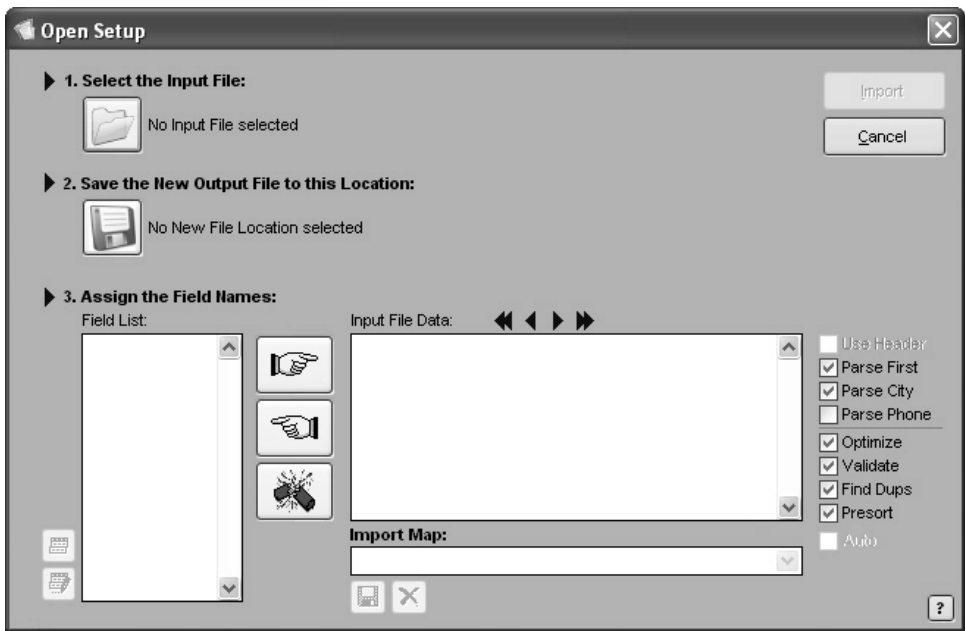


This is the window that you'll become very familiar with if you're going to be scripting. The layout is fairly basic; select a menu, and then choose the menu item you'd click on if you were running *SmartAddresser 5* manually. Any time you're scripting a process in *SmartAddresser 5*, the first event you'll want to create is opening a data source.

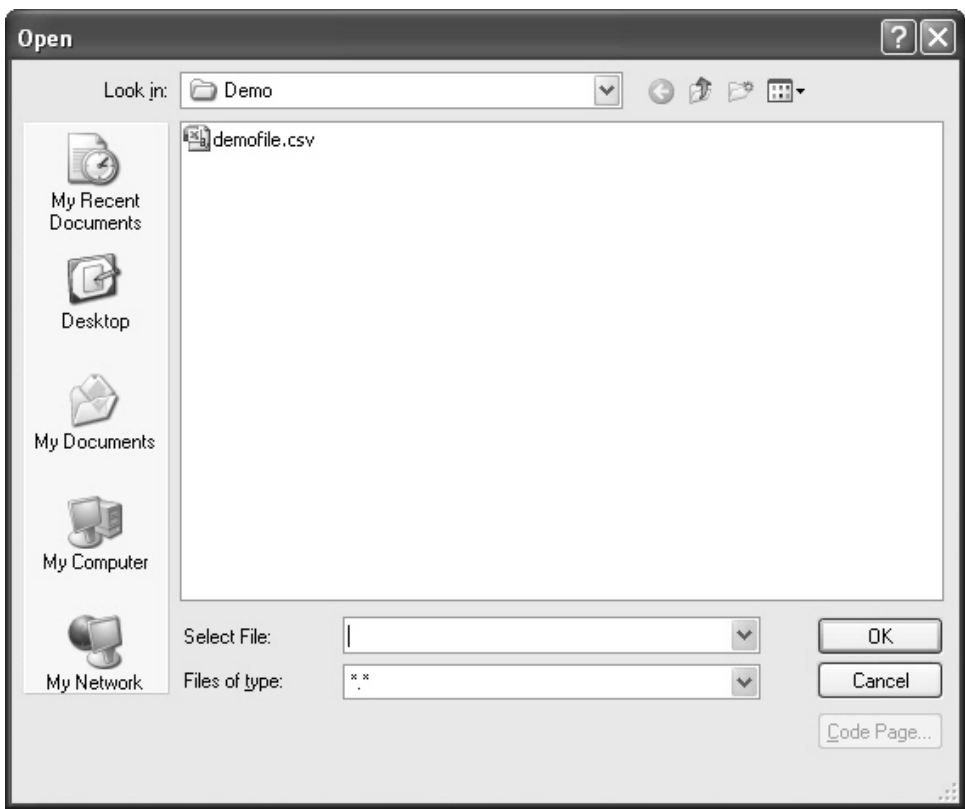
In the Menu pull-down, select File. Then, in the Menu Item pull-down, select Open List.

Click the "Add to Event Sequence" Button .

Click on the Edit Default Menu Items button . You'll then see the Open List window, just as if you were actually opening a list at this time:

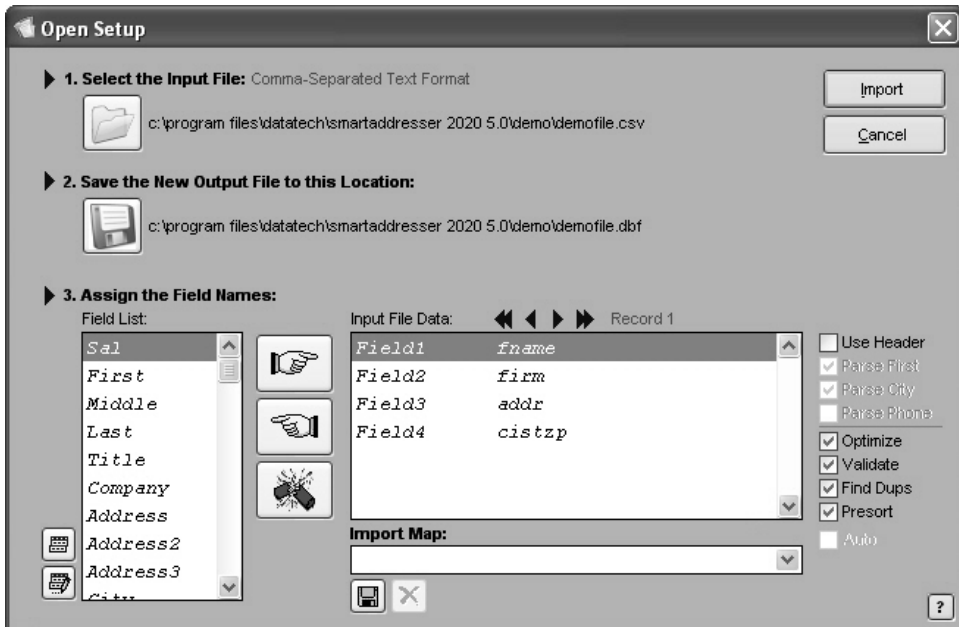


Click on the open button under step number 1, "Select the Input File". For the purposes of this tutorial, we'll be using the demo file located in the C:\Program Files\Datatech\SmartAddresser 2020 5.0\Demo folder:



Browse to the Demo folder (C:\Program Files\Datatech\SmartAddresser 2020 5.0\Demo by default) and select the file named "demofile.csv". Click OK.

The file name and path will appear in the Open Setup screen, and the program will note that the file has been determined to be a Comma-Separated Text file. Much like the standard tutorial, we will now proceed to map the fields.



The file that we are opening contains a Header Record. In this case, manual field mapping is not necessary, because the field names appear in the first record in the file. This is called a Header Record. When you have a Header Record in your file that matches the Auto Field Maps table, you can simply check the Use Header check box and the field names in the first record are used as the SmartAddresser 5 field names for the database.

Click the "Use Header" checkbox on the right side of the window.



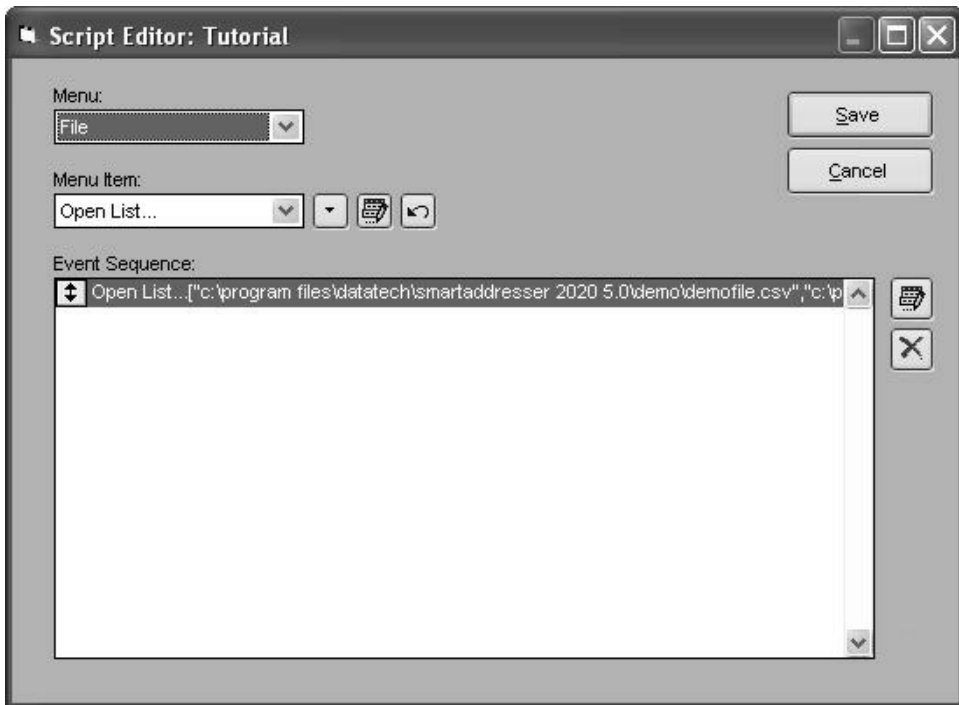
TIP!

One of the key features available within the scripting environment that you won't find through manual use of the software is the "Auto" checkbox. While in the script editor, you'll be able to check the box, which allows the script to run the event(s) automatically. If you want an event to run without any interaction from the user, check the "Auto" checkbox. If you wish to have the script pause briefly and wait for input from the user, leave the box unchecked. In this tutorial, we'll set each event up to run automatically.

SmartAddresser 5

Click the "Auto" checkbox in the lower right-hand corner of the Open Setup window.

Click "Save" on the Open Setup window to return to the Script Editor, which now has a single "Open List" event listed:



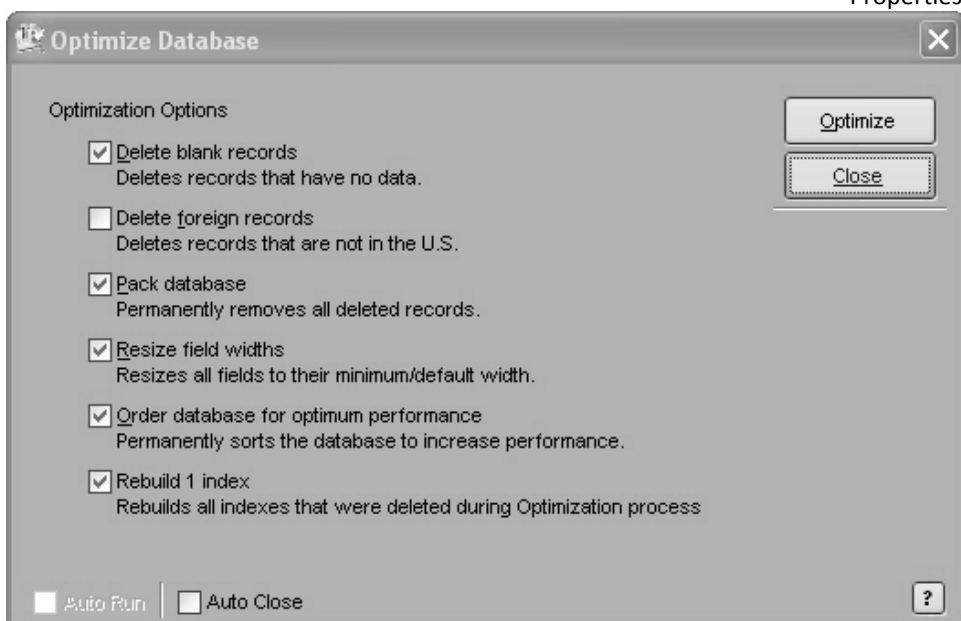
Congratulations! You've just created your first automated event within the SmartAddresser 5 5.0 Scripting Engine. Each event that you add will follow the same set of instructions: selecting a menu, a menu item, adding the selected event to the Event Sequence, modifying the settings, and lastly saving the event. We can now set up the rest of the events for the tutorial!

From the Menu pull-down, select Special.

From the Menu Item pull-down, choose Optimize Database.

Click on the "Add to Event Sequence" button .

Click on the "Edit Menu Item Defaults" button . The Optimize Database window will be presented with the default options, as shown:

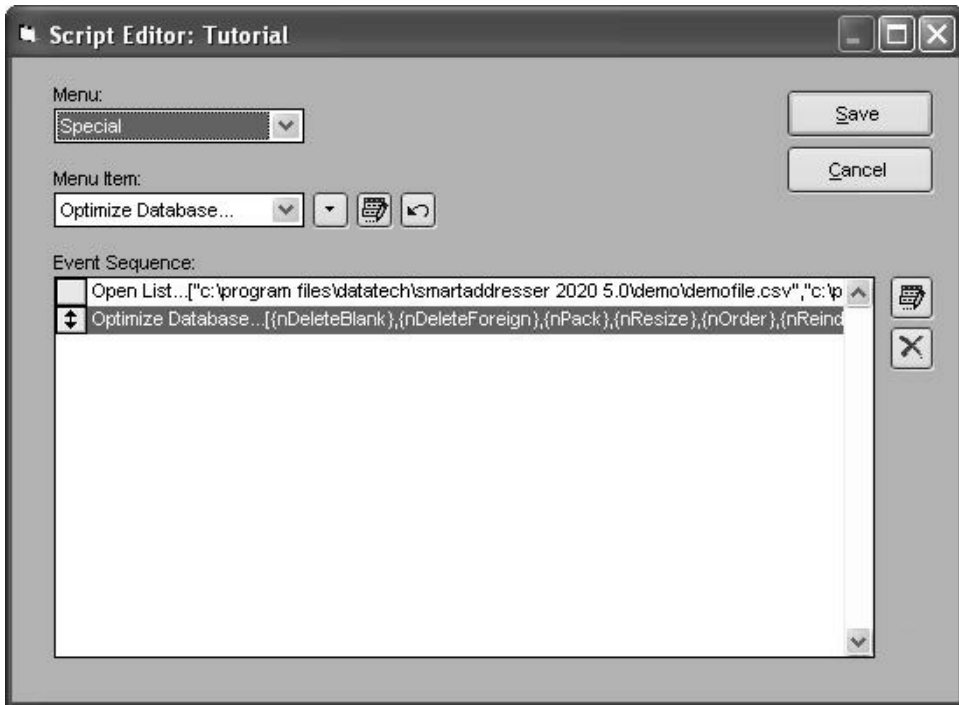


For more information on the optimize database options, see [Optimizing the Database](#).

For the purposes of this tutorial, we'll leave the default options selected.

Click the "Auto Run" checkbox in the lower left-hand corner of the window.

Click Save and you'll be returned to the Script Editor once more. You'll now have two events listed: Open List and Optimize Database.



We're halfway there, now! As you can see, using the scripting engine within *SmartAddresser 5* is very simple, yet very powerful. At this point, you should probably start to feel comfortable with the repetition of steps to add events to the sequence and settings modification. If you still have questions, feel free to review earlier steps for clarification!

Continuing with the Scripting Tutorial, we'll now move on to Validating and Presorting.

From the Menu pull-down, select Special.

From the Menu Item pull-down, select Validate Records.

Click the "Add to Event Sequence" button .

Click on the "Edit Menu Item Defaults" button . You'll be presented with the Validate Records window:

As with previous steps, the default options (with the exception of the Auto Run option) will be fine for the purposes of this tutorial. If you desire clarification or information on the options available, see [Validating the Data](#).

In the Validate Records event for a script, you'll have to do something new: saving the settings. In the lower middle portion of the window, you'll see the "Saved Settings" area. To run a script with a validation event automatically, you'll have to create a saved setting for *SmartAddresser 5* to use. To do so, perform the following steps:

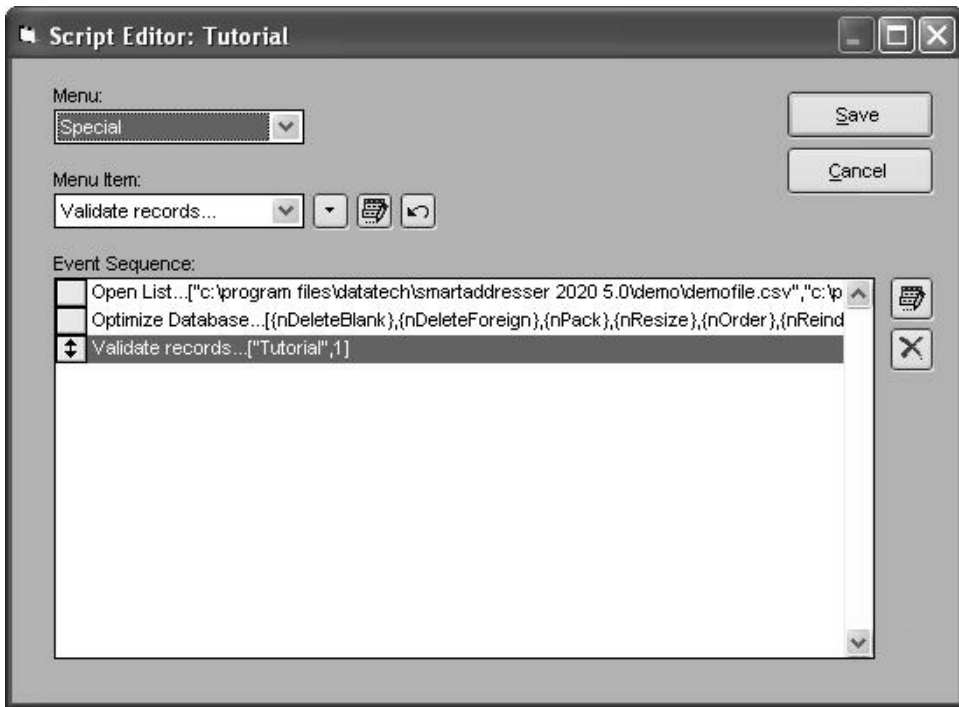
Under the Saved Settings section, click on the "Create New Settings" button . The cursor will be placed into the text box directly above the row of buttons, allowing you to type in a name for your new settings.

Type "Tutorial" (without the quote marks) and then click the Save Settings button . The Saved Settings area should now resemble the following image:

Click the "Auto Run" checkbox in the lower right-hand corner of the window.

SmartAddresser 5

Click the Save button in the upper right-hand corner of the Validate Records window to return to the Script Editor. You should now see three events, as shown:



We'll now create the last tutorial event, the Presort event.

From the Menu pull-down, select Sort.

From the Menu Item pull-down, select Presort Mail.

Click the "Add to Event Sequence" button .

Click on the "Edit Menu Item Defaults" button . You'll be presented with the Presort Mail window. We'll be using the same demo settings from the [Introductory Tutorial](#). If you have previously completed the tutorial, you will already have a saved setting named "Demofile" listed in the Saved Settings pull-down. If not, set up the window as shown in the following diagram:

Presort Setup

Piece Setup:

Class: Standard Mail
 Status: Profit
 Size: Letter
 Weight: Pounds 0.04810
 Type: Machinable
 Pay Type: Imprint
☐ Print Barcodes
☐ Surcharge

Container Setup:

Type: MM Trays
 Minimum: 265 12.7465 lbs.
 Maximum: 311 14.9591 lbs.
☐ Pallets
 Minimum: 1000
 Maximum: 4000

☒ Include Non ZIP+4 Records
☒ Include Carrier Route Level ☐ Detached Address Labels

☐ News ☐ In-county
☐ Create Firm Packages
☐ Contains Advertising ☐ Ride-Along
☐ % Pounds 0.00000

☐ Auto Close ☐ Auto Run

Mail Drop Setup:

ZIP+4: 53714
☒ Madison Carrier Annex VM 53714-2408
☒ SCF Madison VM 53714-9998
☐ BMC Chicago IL 60130-2296

Database and Presort Information:

Demofile.dbf

Save Presort Folder to:

...

Presort Folder name:

Presort Folder

Saved Settings:

☐ Prepare in Reverse order

If you haven't previously completed the [Introductory Tutorial](#), that's okay! You'll just have a few extra steps to take at this point.

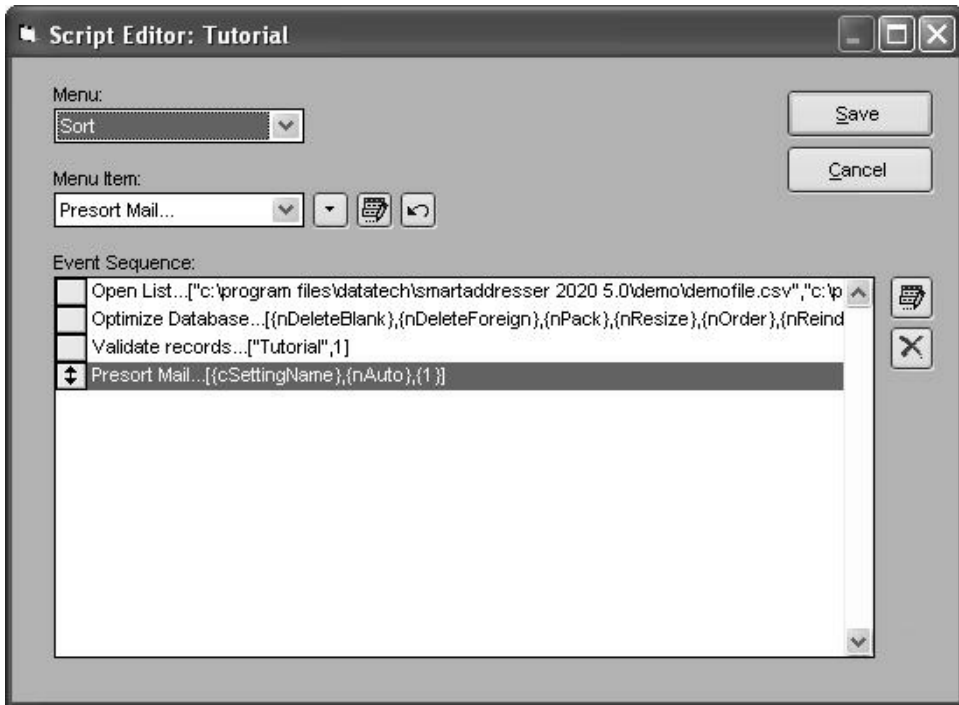
Under the Saved Settings section of the Presort Setup window, click the Create New Settings button . The cursor will move to the Saved Settings text box.

Type "Demofile" (without the quotes) and then click the Save Settings button .

Performing the previous two steps will create the saved settings that the script editor needs to process the presort automatically.

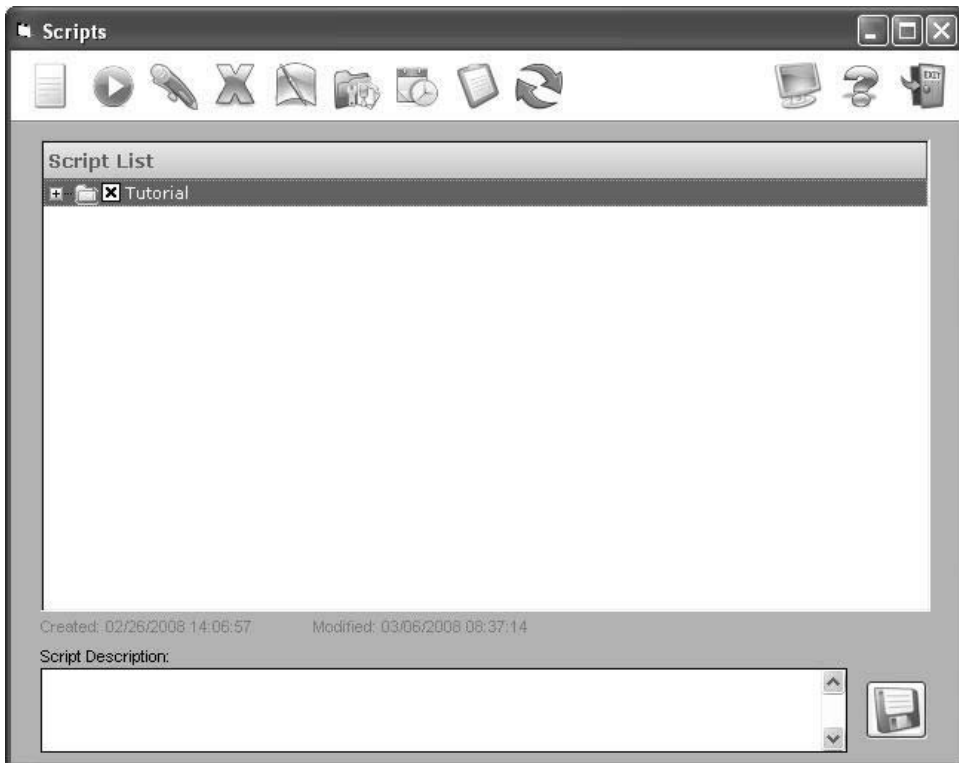
Click the "Auto Run" checkbox in the lower left hand corner of the screen.

Click the Save button to return to the Script Editor window one last time. It should now appear as shown:



Congratulations, you have created your first automated script within *SmartAddresser 5*! Now it's time to save the script and run it to view the results of the tutorial. If all previous steps were performed, you will be allowed to return to the Scripts window and simply click "Run Script", at which point *SmartAddresser 5* will run through the import, optimization, validation, and presort events. You'll be presented with the Print Presort window, as if you had just manually processed a file!

Click the large Save button in the Script Editor window to return to the Scripts window:



The tutorial script will already be highlighted for you.



Click the Run button to view your work! You'll see *SmartAddresser 5 5.0* process the four steps automatically, at which point you'll be presented with a notification that the script completed successfully.

You can then open up My Computer on a Windows PC to navigate to the C:\Program Files\Datatech\SmartAddresser 2020 5.0\Demo\Presort Folder location to see the resulting files that were generated.

Congratulations on creating your first automated script within *SmartAddresser 5!!!* It is recommended that you experiment with the settings before attempting to run a live job, but if you require assistance with scripting, or even general technical support, you can easily reach our highly trained technical support staff via any of the options listed in our [contact information](#).

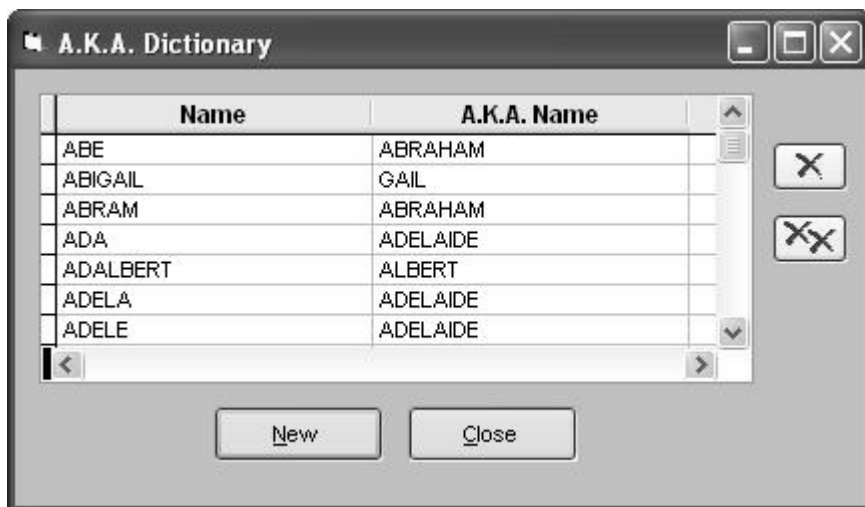
PROPERTIES

DICTIONARIES

A.K.A. Dictionary

The A.K.A. Dictionary includes common match code references that aid in duplicate detection. For example, Bob matched with Robert or Kari matched with Karen. You can edit the A.K.A. Dictionary from either the Properties window or the Show Duplicates window. To edit the A.K.A. Dictionary, follow the instructions below:

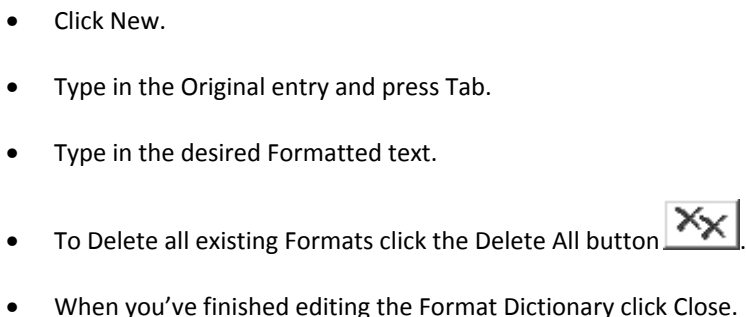
- Click the A.K.A. Dictionary button . The A.K.A. Dictionary window will appear:



- To add a new A.K.A., click on New and type the Name and A.K.A. Name into the new record.
- To delete an existing A.K.A., click the entry and click the delete button .
- To modify an existing entry, highlight the entry and type the modification.
- To delete all of the existing A.K.A. Dictionary entries, click the Delete All button



- In the Format window or Validate Records window, click on the User Defined Dictionary button . The Format Dictionary window will appear:



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If you recognize a pattern in a field that you would like to change throughout the database, you can take advantage of Pattern Based Matching. Pattern Based Matching allows you to change the way information in a field is formatted based on patterns you recognize in your database. You could use this feature to improve address quality for validation or purely for aesthetic purposes. For example, if your address data is entered N100 Main St and it should be 100 N Main St; you can use the Format Dictionary to correct this situation. Pattern Based Matching can be used on any field in the database. Some additional examples of Pattern Based Matching are shown in the table below:

<u>Original Data</u>	<u>Formatted Data</u>	<u>Pattern In</u>	<u>Pattern Out</u>
Address Examples			
123Main	123 Main	[###LLLL	[##_LLLL
000123 Main	123 Main	[#####_LLLL	[##_LLLL
W 100 N 200 Main St	W100N200 Main St	[L_###_L_###_	[L###L###

Other Examples

ABC	A.B.C.	[LLL	[L*L*L*
F.B.I.	FBI	[L*L*L*	[LLL

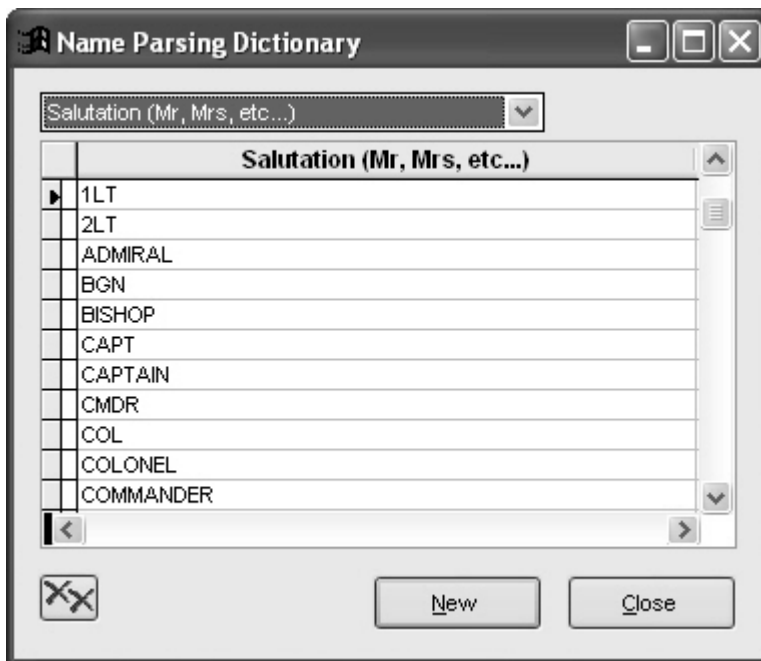
Follow the steps below to use this feature:

- Create a new entry in the Format Dictionary.
- In the Original column, type in an open bracket "[" followed by the data that you need to replace. The bracket indicates that you will be entering a pattern.
- In the Formatted column, Type in a bracket "]" and the desired formatted data. *SmartAddresser 5* will replace the characters you entered with an "L" for letters and a "#" for numbers and an asterisk for other characters.

NAME PARSING DICTIONARY

The Name Parsing Dictionary allows you to set up the program to recognize salutations and suffixes that are not commonly recognized during formatting. We have added some common salutations and suffixes to the dictionary but you can add more as needed. The program will standardize your suffixes based on what you enter in the dictionary

By clicking on the Name Parsing Dictionary Button , you can bring up the Name Parsing Dictionary window:



This window shows all the salutations and suffixes that *SmartAddresser 5* will recognize when parsing the names. Selecting either Salutation or Suffix from the pull-down menu to see matches for the corresponding item. To add a new item (one that may be common in your data but not in the default *SmartAddresser 5* dictionary), do the following:

- Select the proper item from the pull-down menu (Salutation or Suffix)
- Click the New Button on the Name Parsing Dictionary window.
- Type your desired salutation or suffix into the newly created line.
- Click Close. That's it!

The next time you parse the names, *SmartAddresser 5* will see your new salutation or title and treat it as such!

Introduction to the Properties Window

The *SmartAddresser 5* Properties window allows you to maintain settings around your own work environment. There are five areas where you can adjust settings to suit your own needs: Dictionaries, Folders, USPS Links, Fields, Startup, and Validate, as described below.

Dictionaries

Customize the way duplicate records are matched and data is formatted.

Folders

Choose where your files will be opened from or saved to.

USPS Links

Find or change the location of the USPS Database files and connect/establish a link to the USPS Database files.

Fields

Determine the fields to be displayed in the Open Setup and Import Window for field mapping or edit the Auto Field Maps used in Opening a List and Importing. You can also choose a database to be used as a base structure for creating new files.

Startup

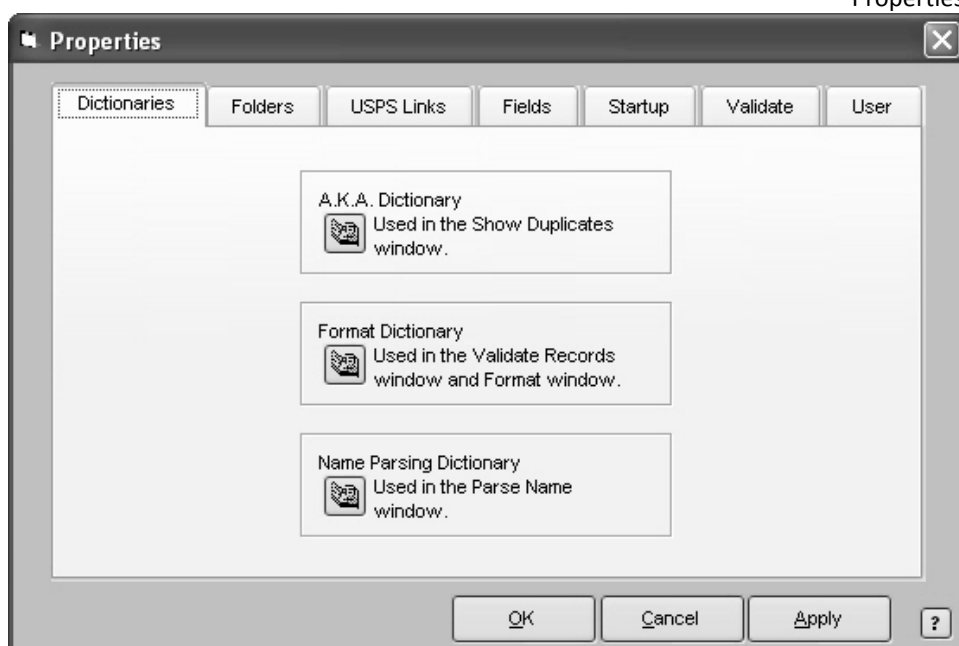
Choose how you would like the program to open or select a color scheme for your *SmartAddresser 5* program windows.

Validate

Define how the address is outputted when validating individual addresses.

Follow the steps below to modify your Properties:

- From the File menu, choose Properties. The Properties window will appear:



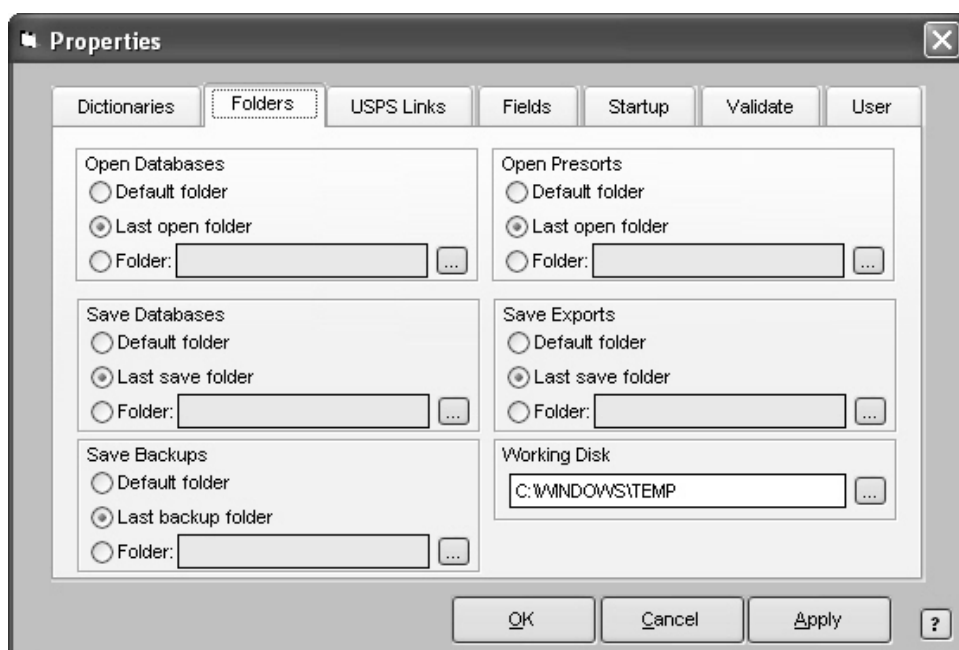
- Click on the tab for the Property that you would like to modify.
 - Refer to the specific Properties topic for further instructions.
-

FOLDERS PROPERTIES TAB

The Folders Properties allow you to choose a folder location to default to when opening files, saving databases, saving backups, opening lists, and saving exports. You can also choose a default folder to save temporary files to. The default folder is always the *SmartAddresser 5* folder and temp files are saved to C:\WINDOWS\TEMP. This feature gives you ultimate control over where your data will be created and/or saved.

Follow the steps below to adjust your folder Properties:

- From the File menu, choose Properties.
- Click on the Folders tab. The Folder Properties window will appear:



As shown above, the Folder Properties are divided into six categories. Each category has the same radio buttons to choose from except for working disk, and these buttons are explained below:

Default Folder

* Uses the default folder which is the *SmartAddresser 5* 3.0 folder.

Last Folder

* Uses the folder that was used last in the respective window.

Folder

* Uses a folder that you determine by clicking on the browse button and selecting a folder from your hard drive.

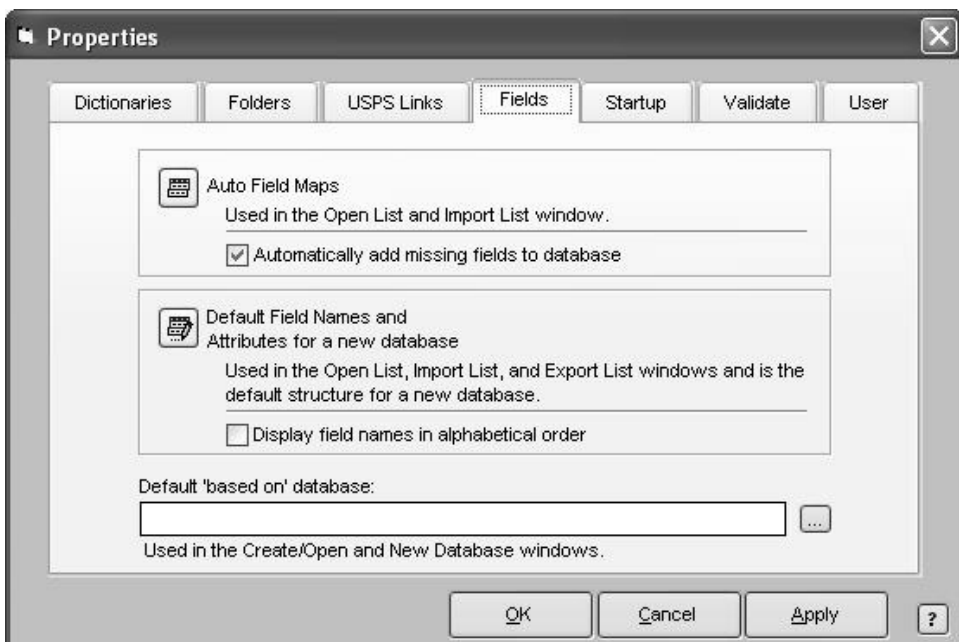
- Choose the desired radio button under each category.
- Change the default folder for your temp files if desired under Working Disk.
- Click OK.

FIELDS PROPERTIES TAB

In Properties, the Fields tab allows you to define automatic field mapping with access to the Auto Map Field List. This feature is used when opening files with a header record. Additionally, the Fields Properties allow you define the Default Field Names and Attributes for new databases. This feature applies in the Open List and Import List windows as well as when you create a new blank database. In Fields Properties, you can also change the default database structure to be used when creating a new blank database.

Follow the steps below to modify your Fields Properties:

- From the Edit menu, choose Properties.
- Click on the Fields Properties tab. The Fields Properties window will appear:



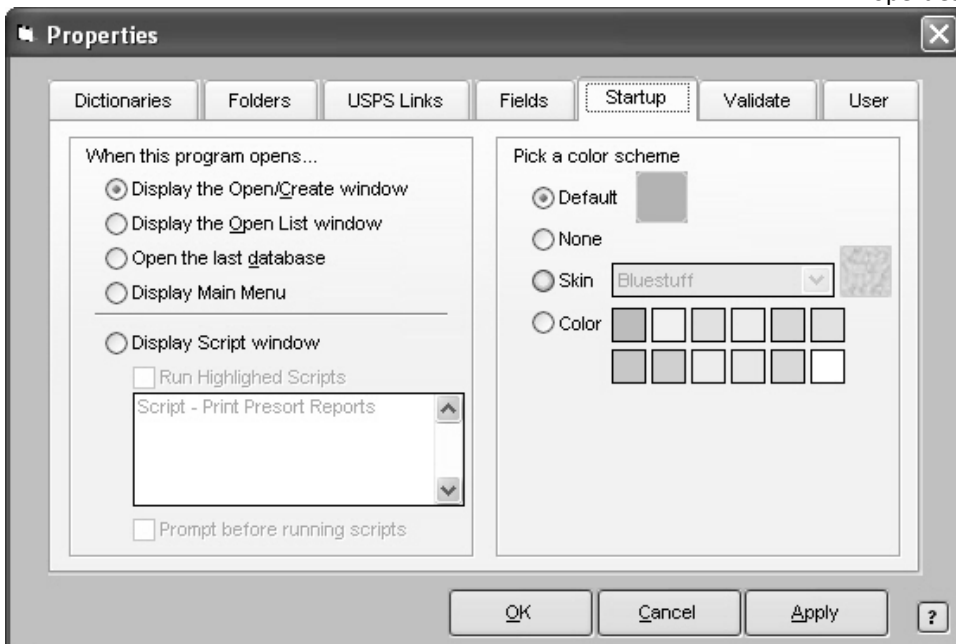
- Click on the Edit Auto Map Field List button if you would like to modify the Auto Map Field List. See Automatic Field Mapping for complete information and instructions on this feature.
- Click on the Edit Field List button if you would like to modify the default database structure used when opening a list, importing lists or when you create a new blank database. When you modify the Table Design using this feature, the field names that you choose will be used as a base for field mapping in the Open Setup window, the Import Window and when you create a new blank database. The feature opens the Table Designer to allow you change field names and field attributes.
- If you have a database already created that contains a structure that you would like to follow in new databases, type in a path to the file or use the browse button to locate the file under Default 'based on' database.
- Check the Display Field Names in Alphabetical Order check box if desired. When you check this box, field names will be displayed in alphabetical order in the Open Setup window.
- Click OK

STARTUP PROPERTIES TAB

The Startup Properties allow you to choose what happens when the program opens. For example, you could go directly to the Open Setup window where you can open an input file, or you could have the Script window open so you can select various scripts to run. You can also change the color scheme for the *SmartAddresser 5* windows in Startup Properties.

Follow the steps below to modify your Startup Properties:

- From the File menu, choose Properties.
- Click on the Startup Properties tab. The Startup Properties window will appear:



- Select an option to perform when *SmartAddresser 5* opens as described below:

Display the Open/Create window

* Displays the Open/Create window when the program opens. See Open/Create Files for complete information and instructions.

Display the Open List window

* Displays the Open List window when the program opens. See Opening a List for complete information and instructions.

Open the last Database

* Opens the last database that was processed in *SmartAddresser 5* when the program opens.

Display Main Menu

* Displays the main menus in *SmartAddresser 5* when the program opens.

- Select a color scheme to be displayed in the background in your *SmartAddresser 5* program windows if desired as explained below:

Default

* Displays the Default background color.

None

* Displays a gray-scale background color.

Skin

* Displays the background skin that you select from the pop-up.

Color

* Displays the background color that you select.

- If you are using the scripting feature and you would like the script window to appear when the program opens, select the Display Script window radio button.
- If you would like a specific script to run, click the Run Highlighted Scripts check box and select the script that you want to run. The ability to run multiple scripts upon startup will be added in a future update.
- If you would like to be prompted before the script runs, click the Prompt before running scripts check box.

VALIDATE PROPERTIES TAB

The Validate Properties are for establishing your settings when validating individual addresses. When you click on an address in your database and from the Special menu, choose Validate this Record or press Ctrl+L on your keyboard, your address output will be determined by the settings that you choose in Validate Properties. When you are validating in batch mode, the output is dependent on the settings that you choose in the Validate Records window. The Validate Properties only control individual address coding.

In Validate Properties, you can choose to expand the address components, punctuate the address components or stop any modification to the input address. You can also abbreviate the address or city by Nth number of characters or choose to use a preferred city name. The Format Dictionary can be enabled or disabled as well.

Follow the steps below to modify your Validate Properties:

From the File menu, choose Properties.

Click on the Validate tab. The Validate Properties window will appear:

Properties

Dictionarys Folders USPS Links Fields Startup **Validate** User

Single Record Validation Settings:

☐ Quick Validation

☐ **Expand Components**

☐ Pre Direction

☐ Suffix

☐ Post Direction

☐ Secondary Name

☐ **Punctuate Components**

☐ Pre Direction

☐ Suffix

☐ Post Direction

☐ Secondary Name

☐ Don't Modify Input Address

☐ Abbreviate Address chars

☐ Enable Dictionary

☐ Abbreviate City

☐ Use Preferred City Name

☐ Format as Mixed Case

OK Cancel Apply ?

- Check the desired check boxes as described below:

Expand Components:

Pre-Direction

* Expands the Pre-Direction in the ADDRESS field. For example: W to West.

Suffix

* Expands the Suffix in the ADDRESS field. For example: Ave to Avenue.

Post Direction

* Expands the Post Direction in the ADDRESS field. For example: SW to Southwest.

Secondary Name

* Expands the Secondary Name in the ADDRESS field. For example: Ste to Suite or Apt to Apartment.

Punctuate:

Pre-Direction

* Punctuates the address Pre-Direction. For example: "W" to "W.".

Suffix

- * Punctuates the address Suffix. For example: "Ave" to "Ave.".

Post Direction

- * Punctuates the address Post Direction. For example: "N" to "N.".

Secondary Name

- * Punctuates the address Secondary Name. For example: "Ste" to "Ste.".

Don't Modify Input Address

- * Protects the input address from any modification that may be necessary to code the address.

Abbreviate Address

- * Abbreviates the address length to the number of characters that you specify. The address length must be between 25 and 40 characters.

Abbreviate City

- * Uses the abbreviated city names in the USPS Database that are 13 characters in length.

Use Preferred City Name

- * Uses the USPS Database city name instead of an alternative to the city name that you have in your database. For example, it would use Los Angeles rather than West Hollywood because West Hollywood is not a city that the USPS recognizes in the USPS Database. When you check this box, a warning will appear that explains the action. If your ST field is two characters wide, the program will automatically abbreviate the state when validating individual records. If your ST field is between three and 29 characters wide, the program will automatically punctuate the state. If your ST field is 30 or more characters wide, the program will automatically expand the state to the full state name.

- Enable the Format Dictionary if desired. See the Format Dictionary topic for more information.
- Select Format as Mixed Case if desired. This feature will format the ADDRESS and CITY fields. If you would like to format other fields see Formatting the Data.

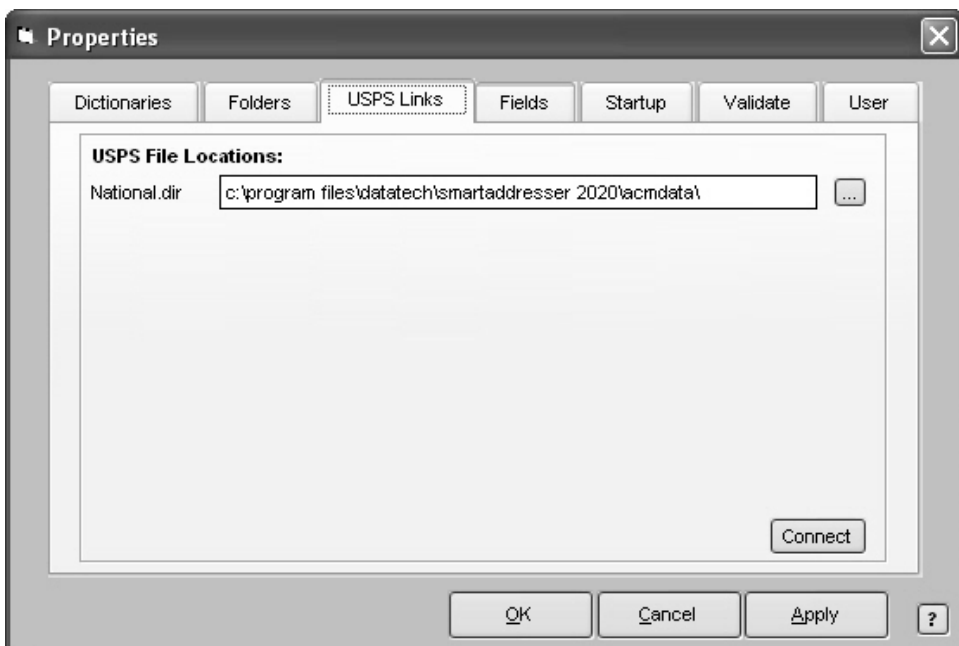
- Click OK.

USPS LINKS PROPERTIES TAB

The USPS Links Properties allow you to check or change the path of your USPS file locations. The window includes an Auto Detect feature that will search every available drive (including all network drives) and locate the USPS files. If you are having trouble linking to the USPS Database, you can use the USPS Links Properties Tab to locate and connect, re-establishing a link to the files. You can also type in a path name for each of the files or you can use the browse buttons to locate them.

Follow the steps below to access the USPS Links Properties:

- From the File menu, choose Properties.
- Click on the USPS Links tab. The USPS Links Properties window will appear:



- You can also type in the path names if you know exactly where the files are located or use the browse buttons to locate each file. *If you would like SmartAddresser 5 to link to the CD ROM drive data rather than a network drive or your hard drive, click the Use CD ROM check box.*
- Click Connect. When the links are established a small dialog box will appear stating that the Linking was Successful.

SmartAddresser 5

- Click OK.



NCOA^{LINK} SETUP AND INFORMATION

NCOA^{LINK}™ INFORMATION

Datatech SmartSoft Inc. is now offering Change-of-Address (COA) processing through its Licensed NCOA^{Link} system. NCOA^{Link} contains approximately 60 million permanent change-of-address records filed with the United States Postal Service® in the last 18 months by customers who want their mail forwarded to their new address. The new feature is seamlessly integrated into the *SmartAddresser* 5 postal software product, allowing users to securely and confidentially process an unlimited number of names and addresses through its Licensed NCOALink system 24 hours, 7 days a week.

Businesses that mail at First-Class, Periodical or Standard Mail™ rates and use a competing postal software product to CASS™ process, Presort and print their names and addresses should seriously consider taking a closer look at the *SmartAddresser* 5 postal software product. By using *SmartAddresser* 5 with the integrated NCOA^{Link} feature, your business may have a significant competitive advantage over your competition. The Licensed NCOA^{Link} system is updated weekly with new information so that your name and address data is always up-to-date, before you mail.

Call us at (888) 227-7221 for additional information about the integrated, real-time NCOA^{Link} processing feature.

NCOA^{LINK}™ INSTALLATION AND INSTRUCTIONAL

Contact our Sales Department about purchasing the NCOA^{Link}™ module for *SmartAddresser* 5. You will be given instructions on how to fill out and submit a Processing Acknowledgement Form. After following those instructions, you will soon be able to process names and addresses through our Licensed NCOA^{Link} System 24/7!

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Our expertly trained technicians are available from 7:00am to 4:00 P.M. Pacific Time, Monday through Friday to help you with any technical problems you may encounter.

Voice Support (800) 578-8324

We pride ourselves in offering little or no wait time, and no automated answering systems. Please be located at the PC that has *SmartAddresser 5* installed, and have any errors on screen when calling, as it will expedite the technician's ability to locate the source of the issue.

Fax Support (800) 368-4686

Please provide as much information as possible, including any copies or notes, about the issue. Please include your company name and contact information, as well as a return fax number.

E-mail Support support@smartsoftusa.com

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GoToAssist allows a *SmartAddresser 5* technician to remotely connect to, and control, your computer. Just like being there with you, the technician can provide training and solutions to solve problems, or make your job easier. *GoToAssist* is a simple browser-based plug-in that installs through most common firewalls and simplifies troubleshooting.

The *SmartAddresser 5* Web Site

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- Order USPS-approved tag stock for dot matrix and laser printers.
- Purchase another copy of *SmartAddresser 5*, or get information on multi-seat licensing options.

SmartAddresser 5

- Renew your subscription for *SmartAddresser 5* or any of its modules.

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SMARTADDRESSER 5™ USERS GUIDE

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Datatech SmartSoft, Inc.
5290 Overpass Road, Suite 132
Santa Barbara, CA 93111-2048

APPENDIX

SMARTADDRESSER 5 DEFAULT FIELD DESCRIPTIONS

SmartAddresser 5 creates fields to store data as you process the list. Some of the fields are required. In other words, they must exist to perform certain processes within the program. Others may only be required for certain types of mail processing. For instance, when a Periodical Mailer is trying to track subscribers and non-subscribers, the program requires the user to store this data in a Logical field named `subscribe_`. Then, when the program presorts the mail, the Postage Statement will display the correct data. Optional Fields also exist for users to store data in. The following table explains the purpose of every field that *SmartAddresser 5* uses to process data.

Field Name	Field Type	Width	Description
<code>abrev_</code>	Character	4	Address Secondary Name Abbreviation (APT, STE, etc.)
<code>acs_key</code>	Character	16	ACS Keyline
<code>acs_part</code>	Character	7	ACS Participation Number
address	Character	60	Mailing Address
<code>address2</code>	Character	50	Second Address Line
<code>address3</code>	Character	50	Third Address Line
<code>address4</code>	Character	50	Fourth Address Line
<code>address5</code>	Character	50	Fifth Address Line
<code>address6</code>	Character	50	Sixth Address Line

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address7	Character	50	Seventh Address Line
address8	Character	50	Eighth Address Line
address9	Character	50	Ninth Address Line
address10	Character	50	Tenth Address Line
area_	Character	3	Area Code
ascdesc_	Character	1	Ascending/Descending Code
barcode	Character	14**	Delivery Point Barcode
chkdg	Character	1	Check Digit
city	Character	30	City Name
cnt_	Numeric	6	Presort Package Count
company	Character	50	Company Name
congress_	Character	2	Congressional District Code
copies_	Numeric	3	Number of Copies per Record for Periodical Mailers
country	Character	30	Country Name
countynm_	Character	30	County Name
countyno_	Character	3	County Number (FIPS)
crrt	Character	4**	Carrier Route Number

department	Character	50	Contact Department
dp	Character	2	Delivery Point
dp_	Numeric	3	Delivery Point Number -/+
dpc	Character	3	Delivery Point and Check Digit
dpv_	Character	3	Delivery Point Validation Codes
dpvnotes_	Character	8	Additional Information Pertaining to Delivery Point Validation
email	Character	30	E-mail Address
entry_date	Date	8	Date Entered
errno_	Character	30	CASS Certification Codes and Errors
ffapplied	Character	8	Contains the Date the Record was Processed Through NCOA Link
financeno_	Character	6	Finance Number
first	Character	55	First Name
group1	Character	40	Group Code 1
group2	Character	40	Group Code 2
group3	Character	40	Group Code 3
group4	Character	40	Group Code 4

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key_	Character	1	Presort Package Group
lacs_	Character	1	LACS Indicator
last	Character	30	Last Name
latitude_	Character	8	Latitude Degrees
leftout_	Character	30	Address Information Not Used
longitude_	Character	8	Longitude Degrees
lot_	Character	4	Line of Travel Number
matchflag_	Character	2	Move Status Applied During NCOA Link Processing
middle	Character	20	Middle Name
mod_date	Date	8	Date Modified
movedate_	Character	6	Date of Move Filed with USPS
movetype_	Character	1	Move Type Returned During NCOA Link Processing
nxi_	Character	2	Status Code Returned During NCOA Link Processing
oaddress	Character	50	Original Address Field Data Before Validation
ocity	Character	30	Original City Field Data Before Validation
ocompany	Character	50	Original Company Field Data Before Validation
ostate	Character	2	Original St Field Data Before Validation

ozipcode	Character	10	Original Zip Field Data Before Validation
phone1	Character	20	First Phone Number
phone2	Character	20	Second Phone Number
phone3	Character	20	Third Phone Number
post_	Character	2	Address Post Direction (S, NW, etc.)
pre_	Character	2	Address Pre Direction (W, SE, etc.)
primary_	Character	10	Primary Address Number
sal	Character	15	Salutation
secy_	Character	8	Address Secondary Number (APT #, STE #, etc.)
st	Character	2**	State Abbreviation
status_	Character	1	Record Validation Status
street_	Character	30	Street Name
subscribe_	Logical	1	Subscriber Status for Periodical Mailers
suffix_	Character	4	Address Suffix (DR, AVE, BLVD, etc.)
timezone_	Character	5	Time Zone
title	Character	50	Contact Title
type_	Character	1	Address Type

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urban	Character	25	Urbanization
walkseq_	Character	6	Sequence Number for Walk Sequence Lists
website	Character	30	Web Site Address
x	Character	1	Field Used to Mark a Record in <i>SmartAddresser 5</i>
zip	Character	10**	Contains the Entire ZIP+4 After CASS Certifying (when valid)
zip4	Character	4	Contains Only the +4 Code
zip5	Character	5	Contains Only the 5-Digit Zip Code

* Fields in bold are required field names

** Widths marked with a double asterisk are required widths.

ADDRESS TYPES

Below is a list of codes and their descriptions that appear in the type_ field after validation:

Code	Description
G	General Delivery Record
H	High Rise Record

P	PO Box Record
R	Rural Route Record
S	Street Record

ERROR AND WARNING CODES

This is a complete list of errors and warning codes that could be attached to a record when you validate it. Even if a record is determined to be a good address, if any components of the address were altered or added, a warning code will be attached to the record. If the record is undeliverable, an error code will be attached to the record. These codes are filled into the field called `Erno_`.

- **Errors & Warnings Summary List**

SmartAddresser 5 can detect forty different kinds of errors when checking an address. A single address will often have multiple errors. Each kind of error is identified by a number, as shown in the following list.

- **Error Summary List**

blank - The address has been successfully coded.

1 The address is coded but undeliverable (i.e. inside of street known to contain no houses).

2 The ZIP code was not found and the city and state cannot be used to determine a geographical area to search.

3 Coding would result in changing both ZIP and city. This is illegal for PO BOX and route type addresses.

4 The best match would result in too many suspicious changes.

5 The street was identified as an alias but was out of the range restricted for that alias.

- 6 No street address was given.
- 7 There are no street name matches in the given ZIP code or in any geographically-related ZIP code.
- 8 The street may contain superfluous components which cannot be discarded with confidence.
- 9 The house number could not be matched.
- 10 The best match was made to a ZIPMOVE record but was not an exact match.
- 11 A ZIPMOVE match was made but no exact match could be found in the new ZIP.
- 12 The Early Warning System indicates that an exact match will become available in the next database update.
- 13 There are multiple matches with the same degree of confidence. This may indicate an inconsistency in the USPS data.
- 14 Incorrect suffix, directional, street name, or unit resulted in multiple matches with the same degree of confidence.
- 15 Incorrect ZIP, city, or urbanization resulted in multiple matches with the same degree of confidence.
- 16 A corrected field was too long to fit into the supplied field.
- 17 Media Error. The database could not be read because of a hardware or system problem.

- **Warning Summary List**

- A Normal street match
- B PO BOX match
- C Route type match
- D 'Unique ZIP' match
- E 'Small town' match
- F Alias match
- G 'Highrise alternate' match

H Firm match

I Highrise match

J Highrise default match

K Route default match

L Street name corrected

M Street suffix corrected

N Predirectional corrected

O Postdirectional corrected

P City corrected

Q State corrected

R ZIP corrected

S Urbanization corrected

T ZIP+4 corrected

U House number corrected

V Unit number corrected

W Secondary unit designator corrected

X Firm corrected

Y Street swapped with firm

Z Street swapped with alternate

0 Dual address changed to PO BOX

1 Dual address street match

2 Input city is not preferred but is acceptable

3 Street standardized

4 Unit not verified

5 Leftovers found

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6 ZIPMOVE match

7 LACSLINK match

- **Error and Warning Codes in Detail**

The following is a description of the *SmartAddresser* 5 error and warning messages in detail:

1 The address is coded but undeliverable (i.e. on side of street known to contain no houses).

1700 Thomas Ave

Santa Barbara CA 93101

2 The ZIP code was not found and the city and state cannot be used to determine a geographical area to search.

123 Main St

Invalid City Name CA 00000

3 Coding would result in changing both ZIP and city. This is illegal for PO BOX and route type addresses.

PO Box 12345

Gaviota CA 93117

NOTE: if the input city is invalid or blank, then it is legal to change both city and zip for these types.

4 The best match would result in too many suspicious changes.

123 State Ave

Santa Barbara CA 93102

NOTE: AccuMail considers some addressing errors as more serious than others. In order to prevent false matches, AccuMail allows at most one of these serious errors. Here are the errors AccuMail considers serious:

- non-blank ZIP was changed
- an alias match was made which requires changing street to base name
- non-blank suffix was changed
- non-blank directional was changed (except for swapping of pre/post)
- more than 1 error in directionals and suffix

- missing unit number (i.e. 123 foo st apt)
- missing SUD (i.e. 123 foo st 1)
- leftovers that must be discarded (i.e. 123 foo st PO Box 456)
- primary range errors (i.e. 123-4 foo st -> 1234 foo st)

5 The street was identified as an alias but was out of the range restricted for that alias.

4179 W Church St
Pine Plains NY 12567

NOTE: The USPS indicates that some aliases apply only to a certain part of the base street. In the above example, the alias is limited to the range

- The AccuMail browse feature does not currently indicate if the alias has a restricted range; and it shows the entire base street - including those ranges which are legal for the alias.

6 No street address was given.

This occurs if the input street is blank AND a match cannot be made by swapping the firm or alternate street fields with the street field.

7 There are no street name matches in the given ZIP code or in any geographically-related ZIP code.

123 Invalid Street
Santa Barbara CA 93101

8 The street may contain superfluous components which cannot be discarded with confidence.

123 Anacapa St Unrecognized Extra Stuff
Santa Barbara CA 93101

9 The house number could not be matched.

12345 Anacapa St
Santa Barbara CA 93101

10 The best match was made to a ZIPMOVE record but was not an exact match.

2 Middle Ave
Cumberland Foreside ME 04110

11 A ZIPMOVE match was made but no exact match could be found in the new ZIP.

620 River Dell Rd

SmartAddresser 5

Breezewood PA 15533

12* The Early Warning System indicates that an exact match will become available in the next database update.

13 There are multiple matches with the same degree of confidence. This may indicate an inconsistency in the USPS data.

RR 3 Box 21

Alvin TX 77511

NOTE: this is often caused by overlapping ranges which have different ZIP+4s.

14 Incorrect suffix, directional, street name, or unit resulted in multiple matches with the same degree of confidence.

123 Islay St
Santa Barbara CA 93101

NOTE: this result indicates that information on the street line would have broken a tie between two or more matches.

15 Incorrect ZIP, city, or urbanization resulted in multiple matches with the same degree of confidence.

14 Cranch St
Quincy Center MA

NOTE: this result indicates that information on the last line would have broken a tie between two or more matches.

A Normal street match

123 State St
Santa Barbara CA 93101

B PO BOX match

PO Box 123
Santa Barbara CA 93102

C Route type match

RR 1 Box 1
Goleta CA 93117

D 'Unique ZIP' match

XYZ
Goleta CA 93199

NOTE: Some entities are assigned an entire 5-digit ZIP code. These ZIPs are flagged as 'Unique' in the postal database. If a street match cannot be made but the city/ZIP indicates a 'Unique ZIP' match, then this correction code will be used.

E 'Small town' match

123 Main St
Frenchboro ME 04635

NOTE: If the location indicated by the city/ZIP contains a single General Delivery record AND NOTHING ELSE, then any input street may be assigned to the General Delivery ZIP+4. The input street is preserved.

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F Alias match

1500 State Highway 154
Santa Barbara CA 93105

G 'Highrise alternate' match

101 Plaza Del Caribe
Ponce PR 00731

NOTE: The 'Highrise Alternate' style of addressing uses the unit number as the house number and the highrise name as the street name. The postal database indicates highrises where this style is used and provides a means for determining the correct street and house number.

H Firm match

Californian Hotel
35 State St
Santa Barbara CA 93101

I Highrise match

202 State St Ste A
Santa Barbara CA 93101

J Highrise default match

202 State St
Santa Barbara CA 93101

K Route default match

RR 1
Goleta CA 93117

L Street name corrected

123 Anakapa St
Santa Barbara CA 93101

M Street suffix corrected

123 Anacapa Ave
Santa Barbara CA 93101

N Predirectional corrected

123 W Anacapa St
Santa Barbara CA 93101

O Postdirectional corrected

123 Anacapa St West
Santa Barbara CA 93101

P City corrected

123 Anacapa St
Goleta CA 93101

Q State corrected

123 Anacapa St
Santa Barbara NY 93101

R ZIP corrected

123 Anacap St
Santa Barbara CA

S Urbanization corrected

A1 Calle 1
Mayaguez PR 00680

T ZIP+4 corrected

U House number corrected

1234-1 Anacapa St
Santa Barbara CA 93101

V Unit number corrected

924 Anacap St Ste X2
Santa Barbara CA 93101

W Secondary unit designator corrected

924 Anacapa St Apt 2X
Santa Barbara CA 93101

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X Firm corrected

Snt Barbara Winery
202 Anacapa St
Santa Barbara CA 93101

Y Street swapped with firm

Z Street swapped with alternate

0 Dual address changed to PO BOX

123 XYZ St Box 456
Santa Barbara CA 93102

1 Dual address street match

123 Anacapa St PO Box 456
Santa Barbara CA 93101

2 Input city is not preferred but is acceptable

4800 Calle Real
Goleta CA 93111

3 Street standardized

123 Anacapa Street
Santa Barbara CA 93101

NOTE: this code is a catch all for many types of corrections made to the street field.

4 Unit not verified

123 Anacapa Street Apt 1
Santa Barbara CA 93101

5 Leftovers found

PO Box 123 Extra Stuff Here
Santa Barbara CA 93102

6 ZIPMOVE match

2 Garden Drive
Litchfield NH 03052

ZIPMOVE IMPLEMENTATION

ZIPMove data identifies address records that may have undergone a change in finance number and shows old side and new side address detail to assist in making a correct address match. AccuMail now includes the ZipMove data provided by the United States Post Office when coding addresses.

LOCATABLE ADDRESS CONVERSION SERVICE (LACS) IMPLEMENTATION

The Locatable Address Conversion System (LACS) provides mailers an automated method of obtaining new addresses in areas in which new 9-1-1 emergency systems have been implemented. This type of address conversion usually involves changing rural-style addresses to city-style addresses, but in some instances, conversions may result in the renaming or renumbering of existing city-style addresses.

PRIVATE MAILBOX (PMB) ADDRESSING

AccuMail must now recognize and retain PMB address information as follows:

- * When PMB information is in the Delivery Address field and a separate PMB output field is available, AccuMail must move the PMB information out of the Delivery Address field to the PMB output field.
- * When PMB information is in the Delivery Address field and there is no separate output field available, AccuMail must retain the PMB information in the Delivery Address field.

Examples:

Input Output

123 MAIN ST # 4 PMB A3 123 MAIN ST STE 4 PMB A3

7 LACSLINK match

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